

100

LEADING NATIONAL ADVERTISERS

U.S. MARKETER PROFILE EDITION

Ad Age's exclusive national ad spending estimates, as well as measured brand spending, key personnel at the client, agency and media specialist are profiled for top 100 marketers. A supplement to the Ad

Age Special Report, (AA, June 28), additional electronic copies of this report can be downloaded from AdAge.com QwikFIND aap73j. More information is available in the AdAge.com DataCenter.

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■ ADVERTISING AGE'S EXCLUSIVE RANKING OF THE NATION'S TOP SPENDERS

About this profile edition

THE 100 LEADING NATIONAL Advertisers boosted their spending in all forms of advertising by 9% to \$90.31 billion in 2003 and in the process elevated the nation's total media expenditures for the first time above pre-recession 2000 levels.

The media component of the Top 100, at \$52.21 billion, up 9.3%, accounted for 40.7% of the nation's total media spending of \$128.35 billion in 17 media. An unmeasured ad component of \$38.1 billion (up 8.7%) claimed the rest of the total ad pot.

These Leaders drove media spending in 2003 as non-Top 100 advertisers grew only 4.1% in 2003. By comparison, media expenditures in 2000 were \$118.45 billion drawn from 11 media. Last year those same 11 media in the aggregate passed 2000 levels. It has been an uphill climb since media plunged 7.8% in 2001. Growth of 5% in 2002 still left media short of its high-water mark in 2000.

General Motors Corp. at \$3.43 billion in total advertising, down 1.4%, beat back Procter & Gamble Co. at \$3.32 billion, up 24.3%, to claim honors as top spender, although P&G seems poised to reclaim the No. 1 spot it lost to GM in 1997.

This pdf version of the 100 Leading National Advertisers augments the printed version (*AA*, June 28, 2004) by producing profiles on each Top 100 advertiser. Content of this pdf is as follows:

● **Charts:** Key charts in this report include:

The Top 100: The list covers GM to No. 100 Canon at \$317.2 million, up 44%. Thirty-three marketers on the list have U.S. ad totals above \$1 billion.

Domestic ad spending: This chart is a compilation of media spending from 20 mediums--most of them monitored by TNS Media Intelligence/CMR--and

unmeasured spending estimates both for the Top 100 (\$38.1 billion) and for all advertisers (\$117.1 billion) in the U.S.

U.S. ad spending by ad category: This chart breaks out 11 measured media by 23 ad categories using TNSMI/CMR Ad\$spender data, from automotive at \$18.39 billion, up 8.2%, to oil & gas at \$261.3 million, up 0.3%.

● **Brands:** There were 549 brands on which the Top 100 spent more than \$10 million in measured media in 2003, according to TNSMI/CMR. *Ad Age* lists these so-called megabrands by their media spending in each profile.

P&G supported 46 such megabrands in 2003, by far the most among the Top 100. No. 8 Johnson & Johnson was closest to P&G in power brands with 26. P&G's top brand was Crest dental care at \$272.7 million in media, up 54.3%; Johnson & Johnson's lead brand was Tylenol pain relief remedies at \$209.5 million, up 56.2%. The Verizon Communications megabrand was the hands-down media king at \$1.2 billion, up 11.5%.

● **Sales and earnings:** Primary financial data on each Top 100 company is provided for two consecutive years. Data include worldwide sales and earnings, U.S. sales and operating income, and sales by global division.

● **Personnel, brands, agencies:** *Ad Age* lists key marketing executives at the brand or category level of each Top 100 company, and personnel responsible for those accounts at traditional and specialty agencies and media specialty companies.

● **Methodology:** U.S. measured spending was pulled for the 250 largest national advertisers, a group pared to 100 after adding unmeasured ad estimates.

TNSMI/CMR's Strategy product provided measured spending in 15 national media and the Yellow Pages Integrated Media Association contributed spending in Yellow Pages.

Unmeasured spending is an *Ad Age* estimate and includes direct mail, sales promotion, co-op spending, couponing, catalogs, business and farm publications and special events, to name a few. Unmeasured basically is the difference between a company's reported or estimated ad costs and its measured media. The reported ad costs, if global, is weighted by *Ad Age* to reflect a U.S.-only share.

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DOMESTIC ADVERTISING SPENDING TOTALS

By media bought in 2003 and 2002

MEDIA	ALL U.S. ADVERTISING SPENDING FROM TNSMI/CMR						COEN'S U.S. TOTALS*		
	ADVERTISING EXPENDITURES			MEDIUM AS % OF TOTAL					
	2003	2002	% CHG	2003	2002		2003	2002	% CHG
Magazine	\$18,347	\$17,254	6.3	7.5	7.3		\$11,435	\$10,995	4.0
Sunday magazine	1,331	1,264	5.3	0.5	0.5		NA	NA	NA
Business publications	7,277	7,227	0.7	3.0	3.1		4,004	3,976	0.7
Local magazines	325	311	4.6	0.1	0.1		NA	NA	NA
National newspaper	2,976	2,814	5.8	1.2	1.2		7,357	6,806	8.1
Local newspaper	22,787	20,092	13.4	9.3	8.5		37,486	37,225	0.7
FSIs	1,317	1,239	6.3	0.5	0.5		NA	NA	NA
Network TV	20,375	20,016	1.8	8.3	8.4		15,030	15,000	0.2
Spot TV	16,244	17,165	-5.4	6.6	7.2		23,468	24,034	-2.4
Syndicated TV	3,396	2,946	15.3	1.4	1.2		3,434	3,034	13.2
Spanish-language network TV	2,196	1,946	12.8	0.9	0.8		NA	NA	NA
Cable TV networks	12,251	10,593	15.6	5.0	4.5		13,954	12,071	15.6
Cable local spot	NA	NA	NA	NA	NA		4,860	4,226	15.0
Network radio	1,001	966	3.6	0.4	0.4		798	775	3.0
National spot radio	2,635	2,452	7.5	1.1	1.0		3,540	3,340	6.0
Local radio	6,732	6,575	2.4	2.7	2.8		14,762	14,762	0.0
Outdoor	2,673	2,475	8.0	1.1	1.0		5,443	5,175	5.2
Direct mail	NA	NA	NA	NA	NA		48,370	46,067	5.0
Yellow Pages	NA	NA	NA	NA	NA		13,896	13,776	0.9
Internet	6,495	5,613	15.7	2.6	2.4		5,650	4,883	15.7
Measured	128,358	120,949	6.1	52.3	51.1		213,487	206,145	3.6
Unmeasured	117,119	115,926	1.0	47.7	48.9		31,990	30,730	4.1
Total U.S.	245,477	236,875	3.6	100.0	100.0		245,477	236,875	3.6

Notes: Dollars are in millions. Media expenditures by medium from TNS Media Intelligence/CMR, except Yellow Pages from Yellow Pages Integrated Media Association. The total for ALL U.S. ADVERTISING media expenditures (\$245.48 billion) is from Robert J. Coen's media analysis at Universal McCann. *The ALL U.S. ADVERTISING unmeasured is the Coen total minus the TNSMI/CMR total media (\$128.36 billion). The individual media comprising that TNSMI/CMR total differ slightly from the totals in the table below. TNSMI/CMR's database is live. New media and markets are constantly being added and updated. Data reports run at different times yield slightly different results.

DOMESTIC ADVERTISING SPENDING BY CATEGORY

By media bought in 2003 and 2002

RANK '03 '02	CATEGORY	MEASURED MEDIA		U.S. MEASURED MEDIA BREAKOUT FOR 2003						
		2003	% CHG	MAGAZINE	NEWSPAPER	OUTDOOR	TV	CABLE NETS	RADIO	INTERNET
1 1	Automotive	\$18,393.3	8.2	\$2,196.7	\$6,271.0	\$339.4	\$7,878.2	\$1,058.4	\$434.1	\$215.5
2 2	Retail	16,204.9	6.3	1,364	6,685	291	5,127	873	750	1,115
3 3	Movies, media, advertising	8,319.4	7.6	1,539	2,301	231	2,252	589	353	1,055
4 5	Medicines & proprietary remedies	6,863.2	18.7	1,882	200	13	3,382	953	215	218
5 4	Food, beverages, confectionery	6,403.0	0.4	1,551	40	50	3,366	1,158	172	67
6 6	Financial services	6,236.0	10.6	918	1,482	193	1,725	802	200	916
7 7	Home furnishings, supplies, appliances	5,927.4	10.1	2,178	181	14	2,300	1,065	126	63
8 8	Telecommunications	5,592.3	14.1	358	1,924	107	2,005	530	372	296
9 10	Personal care	5,045.6	13.6	1,773	47	8	2,417	713	46	41
10 9	Airlines, hotels, car rental	4,690.5	0.7	1,083	1,607	264	820	463	119	334
11 11	Direct response cos.	4,489.0	8.0	1,715	380	2	1,005	1,256	41	89
12 12	Restaurants and fast food	4,130.8	2.5	106	149	206	3,034	471	150	15
13 13	Computers, software, Internet	3,985.7	1.0	1,664	378	26	797	391	86	644
14 14	Insurance and real estate	3,278.5	14.1	359	1,200	195	931	315	119	158
15 16	Apparel	2,300.4	4.1	1,648	26	20	332	195	16	64
16 15	Government, politics and organizations	1,908.0	-24.7	281	375	99	780	143	104	125
17 17	Beer, wine & liquor	1,809.5	-5.6	453	56	156	772	239	64	69
18 18	Business & manufacturing equipment	1,739.5	-4.8	1,076	145	21	276	94	55	74
19 19	Public Service Announcements	1,727.3	-2.3	0	0	0	1,628	99	0	0
20 20	Sporting goods, toys and games	1,514.1	5.6	454	24	6	463	481	11	74
21 21	Pets, pet foods and supplies	460.5	12.8	103	3	1	241	97	2	14
22 22	Cigarettes, tobacco	376.8	29.7	295	9	1	56	12	3	1
23 23	Gas & oil	261.3	0.3	59	8	4	89	58	39	4
	Miscellaneous	8,818.4	8.6	2,104	2,271	427	2,510	640	159	707
	Total	120,475.6	6.7	25,159	25,763	2,674	44,189	12,696	3,636	6,358

Notes: Dollars in millions. 2002 ranking represents data compiled in 2004. Table includes measured media from TNS Media Intelligence/CMR. Yellow Pages is excluded from these totals as are local radio, spot cable and FSIs, all of which are included in the \$245.48 billion ad total for the U.S. in the top chart. Some categories are aggregated from CMR classifications as follows: **Apparel:** Ready-to-wear/Underclothing & hosiery/Apparel NEC/Jewelry & watches/Apparel accessories/ Footwear; **Business & manufacturing equipment:** Manufacturing-materials & equip, freight, ind dev/Office machines/Furniture & supplies/Business & technology; **Toiletries, cosmetics & personal care:** Cosmetics & beauty aids-wmn, m&w, Unisex/Personal hygiene & health-wmn, m&w, unisex/Hair products & access-wmn, m&w, unisex/Toiletries, hygienic goods & skin care-men; **Food, beverages & confectionery:** Beverages/Confectionery & snacks/Dairy, produce, meat & bakery goods/Prepared foods/Ingredients, mixes & seasonings; **Home furnishings, appliances, supplies:** Household soaps, cleansers & polishes/Household furnishings & accessories/Building materials, equipment & fixtures/Home & building/Household appliances, equipment & utensils/Household supplies; **Medicines & proprietary remedies:** Pharmaceutical houses/Medicines & proprietary remedies/Drugs, toiletries & fitness/Eye glasses, medical equip & supplies; **Miscellaneous:** Aviation (excluding freight)/Miscellaneous services & amusements/Schools, camps, seminars/General NEC/Miscellaneous merchandise/Horticulture & farming; **Retail:** Discount department & variety stores/Department stores/Retail/Shopping centers & catalog showrooms. Consumer magazine includes Sunday magazine, local magazine and business publication; TV includes network, spot, syndicated and Spanish-language TV; radio is network and national spot; newspaper includes national newspaper.

100 LEADERS

Ranked by total U.S. advertising spending 2003

RANK		ADVERTISER	HEADQUARTERS	TOTAL U.S. ADVERTISING SPENDING			U.S. MEASURED MEDIA SPENDING		
2003	2002			2003	2002	% CHG	2003	2002	% CHG
1	1	General Motors Corp.	Detroit	\$3,429.9	\$3,477.5	-1.4	\$2,366.6	\$2,399.5	-1.4
2	3	Procter & Gamble Co.	Cincinnati	3,322.7	2,673.4	24.3	2,684.4	2,159.9	24.3
3	2	Time Warner	New York	3,097.3	2,922.8	6.0	1,847.2	1,743.1	6.0
4	4	Pfizer	New York	2,838.5	2,566.2	10.6	1,011.5	914.4	10.6
5	6	DaimlerChrysler	Auburn Hills, Mich./Stuttgart, Germany	2,317.5	2,031.8	14.1	1,608.2	1,410.0	14.1
6	5	Ford Motor Co.	Dearborn, Mich.	2,233.8	2,251.8	-0.8	1,444.5	1,456.2	-0.8
7	7	Walt Disney Co.	Burbank, Calif.	2,129.3	1,803.0	18.1	1,391.7	1,178.4	18.1
8	8	Johnson & Johnson	New Brunswick, N.J.	1,995.7	1,799.0	10.9	1,251.9	1,128.6	10.9
9	11	Sony Corp.	Tokyo	1,814.8	1,621.1	12.0	1,003.7	896.6	12.0
10	13	Toyota Motor Corp.	Toyota City, Japan	1,682.7	1,552.7	8.4	1,014.2	935.8	8.4
11	14	Verizon Communications	New York	1,674.2	1,527.5	9.6	1,197.8	1,092.8	9.6
12	9	Sears, Roebuck & Co.	Hoffman Estates, Ill.	1,633.6	1,661.2	-1.7	785.8	799.1	-1.7
13	17	General Electric Co.	Fairfield, Conn.	1,575.7	1,256.1	25.4	787.8	628.1	25.4
14	12	GlaxoSmithKline	Greenford, Middlesex, U.K.	1,553.7	1,554.0	-0.0	776.1	776.2	-0.0
15	23	SBC Communications	San Antonio, Texas	1,511.0	1,091.6	38.4	1,037.8	749.7	38.4
16	15	McDonald's Corp.	Oak Brook, Ill.	1,368.3	1,335.7	2.4	638.3	623.1	2.4
17	10	Unilever	London/Rotterdam	1,332.1	1,640.0	-18.8	571.8	704.0	-18.8
18	18	Altria Group	New York	1,311.0	1,206.0	8.7	1,006.9	926.2	8.7
19	26	Nissan Motor Co.	Tokyo	1,300.7	966.7	34.6	961.8	714.8	34.6
20	20	Merck & Co.	Whitehouse Station, N.J.	1,264.4	1,158.4	9.1	355.4	325.6	9.1
21	16	Viacom	New York	1,248.8	1,259.8	-0.9	782.2	789.0	-0.9
22	21	L'Oreal	Paris	1,239.4	1,117.7	10.9	636.1	573.6	10.9
23	22	PepsiCo	Purchase, N.Y.	1,212.2	1,113.9	8.8	891.1	818.9	8.8
24	32	Home Depot	Atlanta	1,149.9	885.2	29.9	561.3	432.0	29.9
25	31	Microsoft Corp.	Redmond, Wash.	1,147.2	909.1	26.2	569.9	451.6	26.2
26	19	Honda Motor Co.	Tokyo	1,143.7	1,192.8	-4.1	709.0	739.4	-4.1
27	25	Nestle	Vevey, Switzerland	1,112.7	1,073.2	3.7	520.4	501.9	3.7
28	24	U.S. Government	Washington	1,102.3	1,082.8	1.8	642.8	631.4	1.8
29	28	Target Corp.	Minneapolis	1,083.3	960.0	12.8	600.9	532.5	12.8
30	34	Sprint Corp.	Westwood, Kan.	1,069.3	863.0	23.9	805.8	650.3	23.9
31	33	AT&T Wireless	Redmond, Wash.	1,034.9	872.9	18.6	817.1	689.2	18.6
32	30	News Corp.	Sydney	1,031.8	944.5	9.2	779.0	713.1	9.2
33	27	J.C. Penney Co.	Plano, Texas	1,024.8	965.2	6.2	409.9	386.1	6.2
34	56	Novartis	Basel, Switzerland	966.5	569.3	69.8	394.9	232.6	69.8
35	29	General Mills	Minneapolis	955.6	954.1	0.2	615.9	615.0	0.2
36	38	Estee Lauder Cos.	New York	905.6	805.3	12.5	146.6	130.4	12.5
37	41	Hewlett-Packard Co.	Palo Alto, Calif.	898.9	736.1	22.1	511.2	418.6	22.1
38	35	IBM Corp.	Armonk, N.Y.	862.0	832.3	3.6	427.8	413.1	3.6
39	36	Best Buy Co.	Eden Prairie, Minn.	837.5	818.7	2.3	324.9	317.6	2.3
40	44	Wyeth	Madison, N.J.	821.4	724.7	13.4	342.9	302.5	13.4
41	48	Mars Inc.	McLean, Va.	813.4	653.1	24.5	431.5	346.5	24.5
42	58	Bristol-Myers Squibb Co.	New York	778.1	563.5	38.1	230.3	166.8	38.1
43	40	Anheuser-Busch Cos.	St. Louis	776.4	792.9	-2.1	445.2	454.7	-2.1
44	43	Cendant Corp.	Parsippany, N.J.	773.1	726.9	6.4	231.7	217.8	6.4
45	46	ConAgra Foods	Omaha, Neb.	764.8	680.1	12.4	189.3	168.3	12.4
46	42	Yum Brands	Louisville, Ky.	761.1	732.6	3.9	659.9	635.2	3.9
47	39	Diageo	London	748.2	797.8	-6.2	206.0	219.7	-6.2
48	45	Federated Department Stores	Cincinnati	707.2	715.1	-1.1	615.7	622.6	-1.1
49	52	Wal-Mart Stores	Bentonville, Ark.	677.9	618.1	9.7	479.4	437.2	9.7
50	59	American Express Co.	New York	673.1	542.1	24.2	379.7	305.8	24.2

Notes: Dollars are in millions. 2002 rankings represent data compiled in 2004. Measured media from TNS Media Intelligence/CMR's Strategy and Yellow Pages Integrated Media Association.

100 LEADERS (CONTINUED)

Ranked by total U.S. advertising spending 2003

RANK		ADVERTISER	HEADQUARTERS	TOTAL U.S. ADVERTISING SPENDING			U.S. MEASURED MEDIA SPENDING		
2003	2002			2003	2002	% CHG	2003	2002	% CHG
51	47	May Department Stores Co.	St. Louis	\$630.0	\$655.9	-4.0	\$544.7	\$567.1	-4.0
52	65	Gillette Co.	Boston	611.7	495.0	23.6	321.7	260.3	23.6
53	63	Kroger Co.	Cincinnati	611.5	508.9	20.2	110.7	92.1	20.2
54	64	Schering-Plough Corp.	Madison, N.J.	609.0	507.6	20.0	269.1	224.3	20.0
55	54	Volkswagen	Wolfsburg, Germany	608.2	602.4	1.0	448.8	444.6	1.0
56	53	Sara Lee Corp.	Chicago	582.7	604.7	-3.6	196.0	203.4	-3.6
57	71	Kellogg Co.	Battle Creek, Mich.	569.7	429.1	32.8	374.1	281.8	32.8
58	61	Dell	Austin, Texas	564.8	510.6	10.6	466.9	422.1	10.6
59	51	Nike	Beaverton, Ore.	559.0	623.5	-10.4	214.4	239.2	-10.4
60	55	Clorox Co.	Oakland, Calif.	553.4	572.3	-3.3	487.8	504.5	-3.3
61	83	Safeway	Pleasanton, Calif.	533.3	356.2	49.7	107.0	71.5	49.7
62	49	Burger King Corp.	Miami	524.5	650.1	-19.3	294.3	364.7	-19.3
63	62	Deutsche Telekom	Bonn, Germany	517.6	509.3	1.6	371.5	365.5	1.6
64	79	MCI	Ashburn, Va.	517.0	371.2	39.3	376.7	270.5	39.3
65	69	Lowe's Cos.	North Wilkesboro, N.C.	503.7	444.3	13.4	302.2	266.6	13.4
66	78	Mattel	El Segundo, Calif.	487.8	384.4	26.9	189.7	149.5	26.9
67	70	Gap Inc.	San Francisco	485.8	433.6	12.1	373.9	333.7	12.1
68	37	AT&T Corp.	Basking Ridge, N.J.	478.7	815.1	-41.3	264.2	449.8	-41.3
69	57	Coca-Cola Co.	Atlanta	472.7	569.0	-16.9	288.9	347.7	-16.9
70	60	Albertson's	Boise, Idaho	466.8	524.9	-11.1	124.6	140.1	-11.1
71	72	Visa International	San Francisco	462.1	423.2	9.2	332.8	304.8	9.2
72	NA	InterActiveCorp	New York	460.9	279.6	64.8	322.4	195.6	64.8
73	66	Aventis	Strasbourg, France	459.1	486.0	-5.5	173.2	183.3	-5.5
74	93	Kohl's Corp.	Menomonee Falls, Wis.	451.7	316.0	42.9	281.2	196.8	42.9
75	82	MasterCard International	New York	439.5	358.0	22.8	316.9	258.2	22.8
76	80	Bayer	Leverkusen, Germany	434.5	370.6	17.2	221.8	189.2	17.2
77	67	SABMiller	London	432.9	458.5	-5.6	272.4	288.5	-5.6
78	75	Berkshire Hathaway	Omaha, Neb.	430.9	398.5	8.1	259.6	240.1	8.1
79	91	Nextel Communications	Reston, Va.	423.5	319.6	32.5	264.9	199.9	32.5
80	NA	Citigroup	New York	420.2	202.5	107.5	261.6	126.1	107.5
81	50	Kmart Corp.	Troy, Mich.	413.1	628.6	-34.3	179.2	272.6	-34.3
82	68	Campbell Soup Co.	Camden, N.J.	412.3	447.5	-7.9	295.2	320.4	-7.9
83	84	Doctor's Associates	Milford, Conn.	407.9	352.7	15.6	268.8	232.5	15.6
84	NA	AstraZeneca	London	404.3	309.1	30.8	274.8	210.1	30.8
85	74	Limited Brands	Columbus, Ohio	396.5	410.7	-3.4	89.6	92.7	-3.4
86	87	Intel Corp.	Santa Clara, Calif.	393.8	345.2	14.1	131.1	115.0	14.1
87	92	Reckitt Benckiser	Windsor, Berkshire, U.K.	392.8	318.0	23.5	299.7	242.6	23.5
88	81	Wendy's International	Dublin, Ohio	385.8	359.5	7.3	321.5	299.5	7.3
89	77	Mitsubishi Motors Corp.	Tokyo	381.5	392.1	-2.7	276.7	284.3	-2.7
90	NA	BellSouth Corp.	Atlanta	375.6	223.0	68.5	125.9	74.8	68.5
91	85	Kimberly-Clark Corp.	Irving, Texas	347.6	352.5	-1.4	251.9	255.5	-1.4
92	86	Kia Motors Corp.	Seoul	347.3	349.0	-0.5	250.0	251.3	-0.5
93	76	Cadbury Schweppes	London	340.8	396.2	-14.0	230.3	267.8	-14.0
94	90	United Parcel Service	Greenwich, Conn.	339.8	331.4	2.5	172.2	167.9	2.5
95	73	Adolph Coors Co.	Golden, Colo.	339.5	420.3	-19.2	169.0	209.3	-19.2
96	NA	Hyundai Motor Co.	Seoul	332.8	248.4	34.0	239.6	178.8	34.0
97	89	Colgate-Palmolive Co.	New York	331.7	336.7	-1.5	110.9	112.5	-1.5
98	NA	Philips Electronics	Eindhoven, Netherlands	318.7	258.0	23.5	144.8	117.3	23.5
99	88	SC Johnson	Racine, Wis.	318.2	340.7	-6.6	273.4	292.7	-6.6
100	NA	Canon	Tokyo	317.2	220.2	44.0	165.0	114.5	44.0

Notes: Dollars are in millions. 2002 rankings represent data compiled in 2004. Measured media from TNS Media Intelligence/CMR's Strategy and Yellow Pages Integrated Media Association.

■ TOP 100 U.S. ADVERTISERS

ADVERTISER PROFILES

70 Albertson's

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$317	\$42	648.1
Sunday magazine	1,441	931	54.7
Newspaper	46,385	47,201	-1.7
Outdoor	1,833	2,788	-34.2
Network TV	47	NA	NA
Spot TV	57,904	79,246	-26.9
Syndicated TV	78	NA	NA
Cable TV networks	18	15	19.5
National spot radio	15,969	9,796	63.0
Internet	581	70	730.0
Business publications	NA	4	NA
Measured media	124,572	140,092	-11.1
Unmeasured media	342,188	384,820	-11.1
Total	466,760	524,912	-11.1

By brand	2003	2002	% chg
Albertson's food stores	65,719	78,578	-16.4
Jewel food stores	20,546	20,293	1.2
Sav-On drug stores	16,422	16,158	1.6
Osco drug stores	14,606	17,274	-15.4

Sales & earnings (\$ in millions)

Worldwide & U.S.	2003	2002	% chg
Sales	\$35,436	\$35,626	-0.5
Earnings	556	485	14.6

Headquarters

Albertson's/250 Parkcenter Blvd., P.O. Box 20, Boise, Idaho 83726/Phone: (208) 395-6200.

Notes

Albertson's in April 2004 acquired for \$2.5 billion JS USA Holding, owner of 204 Shaw's and Star Markets stores in the New England area.

Personnel, brands, agencies

Corporate: Larry Johnston, chmn & CEO; Peter Lynch, pres & chief operating officer; Bob Butler, Intermountain West div pres & exec VP-company food ops; Judy Spires, Dallas/Ft. Worth div pres; Dave Simonson, Southern California div pres; Donna Robbins, Northern California div pres; Pete VanHelden, Jewel/Osco div pres; Carl Jablonski, Eastern div pres; Kevin Tripp, Drug div pres & exec VP-company drugstore ops; Paul Gannon, Shaw's div pres & CEO.

Duncan & Associates, Los Angeles. Barbie Wentworth, pres & chief operating officer; Steve Moses, acct super. — Acme, Albertson's, Jewel-Osco, Max Foods, Osco-Drug, Sav-on Drugs, Super Saver.

Acento, Los Angeles. Carlos Corboda, acct dir. — Hispanic adv, Albertson's, Jewel, Osco, Sav-On.

Carol H. Williams Advertising, Oakland, Calif. Tracey Clanton, acct dir. — African-American adv, Albertson's.

Dae Advertising, San Francisco. Angel Wong, sr acct exec. — Asian-American adv, Albertson's.

Shaker Recruitment Advertising & Communications, Oak Park, Ill. Judy Potempa, acct exec. — recruitment adv.

18 Altria Group

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$367,942	\$383,645	-4.1
Sunday magazine	18,186	16,548	9.9
Newspaper	9,202	9,324	-1.3
National newspaper	3,943	1,654	138.4
Outdoor	3,576	6,931	-48.4
Network TV	219,300	208,272	5.3
Spot TV	84,357	52,054	62.1
Syndicated TV	37,878	36,707	3.2
Cable TV networks	187,443	160,935	16.5
Network radio	13,527	8,575	57.8
National spot radio	4,796	3,803	26.1
Internet	26,640	5,775	361.3
Spanish-language TV	26,115	26,051	0.2
Business publications	3,781	5,867	-35.6
Local magazines	171	86	97.6
Measured media	1,006,856	926,226	8.7
Unmeasured media	304,130	279,775	8.7
Total	1,310,987	1,206,001	8.7

By brand	2003	2002	% chg
Kraft packaged foods	167,489	122,808	36.4
Nabisco snacks	160,308	163,519	-2.0
Philadelphia cream cheese	138,479	78,363	76.7
Post cereals	109,531	97,245	12.6
Jell-O gelatin	42,440	30,201	40.5
Capri Sun fruit drinks	33,116	25,822	28.2
DiGiorno packaged foods	30,284	20,163	50.2
Planters nuts	25,740	24,841	3.6
Oscar Mayer packaged meats	25,622	19,021	34.7
Kool-Aid drink mixes	25,367	28,478	-10.9
Crystal Light drink mixes	23,083	20,987	10.0
Lunchables packaged foods	22,985	25,032	-8.2
Cool Whip topping	21,994	23,995	-8.3
Altria corporate	16,077	0	NA
Lifesavers candy	13,829	12,851	7.6
General Foods instant coffee	13,681	7,924	72.7
Maxwell House coffee	12,641	19,062	-33.7
Balance energy bars	12,458	23,755	-47.6
Altoid mints	11,773	12,276	-4.1
Creme Savers candy	10,205	14,391	-29.1

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$81,832	\$80,408	1.8
Earnings	9,204	11,102	-17.1
U.S.	2003	2002	% chg
Sales	40,298	44,725	-9.9
Pre-tax earnings	8,201	12,179	-32.7
Division sales	2003	2002	% chg
Tobacco	50,390	52,041	-3.2
Food	31,010	29,723	4.3

Division sales	.....2003	2002	% chg
Financial svcs	.....432	495	-12.7
Beer	.....0	2,641	NA

Headquarters

Altria Group/120 Park Ave., 25th fl., New York, N.Y. 10017-5592/Phone: (917) 663-5000.

Notes

Altria Group became the new name for Philip Morris Cos. in January 2003. In July 2002, South African Breweries (later named SABMiller) bought the company's Miller Brewing Co. with stock. Altria now holds 36% of SABMiller's stock and a 24% voting interest. At that time, Altria deconsolidated its beer business and began accounting for SABMiller under the equity method. *Ad Age* has moved Miller ad expenditures for two consecutive full-year periods to SABMiller in this report.

Personnel, brands, agencies

Corporate: Louis C. Camilleri, chmn & CEO.

Leo Burnett Worldwide, Chicago. John Gatti, sr VP & acct dir; Tom Dudreck, exec VP & vice chmn. — corp campaigns.

Kraft Foods: 3 Lakes Dr., Northfield, Ill. 60093-2753/Phone: (847) 646-2000. Roger K. Deromedi, CEO-Kraft Foods Inc.; Betsy D. Holden, pres-global mktg & category devel; David S. Johnson, pres-N. Amer. commercial; Paula A. Sneed, sr VP-global mktg resources grp; Don Miceli, VP-global media resources; Barbara Ford, VP-global adv resources.

Foote Cone & Belding Worldwide, Chicago & New York. Joan Black, exec VP & ww grp acct dir. — Chicago: A.1, Back to Nature, Boca Foods, Kraft Easy Mac, Kraft Pizza Co. (California Pizza Kitchen, DiGiorno, Tombstone), It's Pasta Anytime, Kraft Cooking, Kraft Macaroni & Cheese, Kraft Natural Cheeses, Kraft Salad Dressings (Good Seasons, Pourables), Velveeta, Ums Cheese Snacks, Jack's pizza, Seven Seas, Shake 'n Bake, Stove Top Stuffing, Stove Top Oven Classics. New York: Chips Ahoy!, Cool Whip, Corn Nuts, CremeSavers, Fig Newtons, Fun Fruits, General Foods International Coffees, Gevalia Kaffe, Gummi Savers, Handi-Snacks, Honeymaid Grahams, Jell-O, Jet Puffed Marshmallows, LifeSavers, Nutter Butter, Oreo, Planters Nuts, SnackWell's, Starbucks Grocery Partnership, Teddy Grahams, Terry's Chocolates, Trolli.

J. Walter Thompson Co., Chicago. Erin Clarke, grp mgmt dir; Tim Mauery, grp mgmt dir. — Breakstone's, Cheez Whiz, Claussen pickles, Grey Poupon, Knudsen dairy prods, Kraft Cheese Nips, Kraft Grated Parmesan, Kraft Mayo, Kraft Singles, Kraft 2% cheese, Miracle Whip, Oscar Mayer, Philadelphia cream cheese, Philly Snack Bars, Ritz & Ritz Bits crackers, Ritz Chips, Triscuit, Wheat Thins.

Leo Burnett Worldwide, Chicago. Jamie King, sr VP & acct dir. — Altoids.

Lord Group, New York. Paul Grundlach, acct exec. — Baker's chocolate, Breyer's yogurt, Sure-Jell.

Ogilvy & Mather Worldwide, New York. Rick Roth, sr ptnr & ww client svcs dir. — Balance Bar, Capri Sun, Country Time, Crystal Light, Kool-Aid, Maxwell House, Post cereals, Tang, VeryFine, Yuban.

Y&R Advertising, New York. Kim Bealle, acct dir. — Bakers Chocolate, Toblerone.

MediaVest, New York. Bill Tucker, mg dir. — media svcs.

Bravo Group, New York. Nilda Velez, VP & grp acct dir. — Hispanic adv, Capri Sun, Chips Ahoy, Kraft Mac n' Cheese, Kraft

Singles, Kool-Aid, Oreo, Oscar Mayer, Post, Pourables, Ritz.

UniWorld Group, New York. Ronny Mills, grp acct dir. — urban mktg, Deluxe Mac & Cheese, Kool-Aid, Post.

Philip Morris USA: 6601 Broad St., Richmond, Va. 23230/Phone: (804) 274-2000. Michael E. Szymanczyk, chmn & CEO; Jack Nelson, pres-ops & tech; Nancy Brennan-Lund, sr VP-mktg; Howard Willard, sr VP-youth smoking & corp responsibility; David Beran, exec VP-strategy, comms & cons contact.

Leo Burnett Worldwide, Chicago. John Gatti, sr VP & acct dir; Tom Dudreck, exec VP. — corp affairs, Basic, Benson & Hedges, Chesterfield, Cambridge, Marlboro, Merit, Virginia Slims.

Y&R Advertising, New York. Jane Brite, exec VP & mg ptnr. — corp affairs, Parliament.

Starcom, Chicago. Mary Ann Foxley, exec VP & media dir. — media svcs.

50 American Express Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$92,386	\$53,896	71.4
Sunday magazine	.991	808	22.6
Newspaper	23,787	19,767	20.3
National newspaper	34,752	20,461	69.8
Outdoor	8,613	6,836	26.0
Network TV	68,988	96,592	-28.6
Spot TV	33,049	25,686	28.7
Syndicated TV	4,518	1,737	160.1
Cable TV networks	71,484	57,324	24.7
Network radio	6,422	2,315	177.4
National spot radio	12,037	3,106	287.6
Internet	14,370	12,117	18.6
Business publications	7,871	4,675	68.4
Local magazines	.443	457	-3.2
Measured media	379,711	305,777	24.2
Unmeasured media	293,415	236,284	24.2
Total	673,126	542,061	24.2
By brand	2003	2002	% chg
American Express financial svcs	368,704	284,223	29.7

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$25,866	\$23,807	8.6
Earnings	2,987	2,671	11.8
U.S.	2003	2002	% chg
Sales	20,859	19,286	8.2
Pre-tax income	3,385	2,983	13.5
Division sales	2003	2002	% chg
Travel related svcs	19,189	17,721	8.3
Am Ex Financial Advisors	6,172	5,617	9.9
American Express Bank	.801	745	7.5
Corporate & other	.104	99	5.1

Headquarters

American Express Co./American Express Tower C, 3 World Financial Center, 200 Vesey St., New York, N.Y. 10285/Phone: (212) 640-2000.

Personnel, brands, agencies

Corporate: Kenneth I. Chenault, chmn & CEO.

American Express Financial Advisors: 200 AXP Financial Center, Minneapolis, Minn. 55474/Phone: (612) 671-3131. Barbara Fraser, exec VP & chief mktg officer; Giunero Floro, VP & head-adv & branding.

Ogilvy & Mather Worldwide, New York. John Seifert, mg ptrn; Bill Brooks, exec grp dir.

MindShare Worldwide, New York. Steve Soldano, sr VP & ww strategic plng dir. — media svcs.

American Express Publishing Corp.: 1120 Ave. of the Americas, New York, N.Y. 10036/Phone: (212) 382-5600. Ed Kelly, pres & CEO; Paul Francis, cfo & sr VP-corp devel & opers; Mark Stanich, sr VP & chief mktg officer; Kathi Doolan, VP & pub-Departures; Julie McGowan, sr VP & pub-Food & Wine; Ellen Asmodeo-Giglio, VP & pub-Travel+Leisure, Travel+Leisure Family; Robert C. Weber, VP & pub-T+L Golf; Janet Libert, pub & editor-Executive Travel SkyGuide.

No agency.

American Express Travel Related Services Co.: American Express Tower C, 3 World Financial Center, 200 Vesey St., New York, N.Y. 10285/Phone: (212) 640-2000. John D. Hayes, chief mktg officer; Nancy Smith, VP-global media & sponsorship mktg; Jennifer Sheehan, VP-U.S. adv; Stephanie Katz-Rothman, VP-U.S. adv; Sid Rothstein, VP-agency mgmt; Ellen Lasch, VP-brand mgmt; Christine Brandt-Jones, VP-marketplace insights.

Ogilvy & Mather Worldwide, New York. John Seifert, mg ptrn. — American Express cards & svcs.

MindShare Worldwide, New York. Steve Soldano, ww strategic plng dir. — media svcs.

43 Anheuser-Busch Cos.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$30,570	\$26,385	15.9
Sunday magazine	502	274	83.6
Newspaper	9,240	9,660	-4.3
National newspaper	2,753	2,698	2.0
Outdoor	56,977	49,264	15.7
Network TV	227,986	237,167	-3.9
Spot TV	57,507	60,294	-4.6
Syndicated TV	1,351	5,743	-76.5
Cable TV networks	39,220	34,561	13.5
Network radio	NA	375	NA
National spot radio	495	306	61.6
Internet	3,732	7,038	-47.0
Spanish-language TV	12,745	18,606	-31.5
Business publications	2,026	2,253	-10.1
Local magazines	79	41	92.6
Measured media	445,182	454,664	-2.1
Unmeasured media	331,179	338,232	-2.1
Total	776,361	792,896	-2.1
By brand	2003	2002	% chg
Budweiser & Bud Light beers ..	266,689	277,526	-3.9
Michelob beers	86,582	86,210	0.4
Busch & Busch Light beers ..	64,155	52,865	21.4
Sea World parks	18,323	14,691	24.7

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$14,147	\$13,566	4.3
Earnings	2,076	1,934	7.3

U.S.	2003	2002	% chg
Sales	13,510	12,984	4.1
Net income	1,675	1,535	9.1
Division sales	2003	2002	% chg
Domestic beer	12,997	12,563	3.5
Packaging	2,094	2,072	1.1
Entertainment	924	859	7.6
International beer	797	714	11.6
Other	74	93	-20.4

Headquarters

Anheuser-Busch Cos./1 Busch Place, St. Louis, Mo. 63u8/Phone: (314) 577-2000.

Notes

Anheuser-Busch in June 2004 named Michael Owens to the new post of vice president of sales and marketing, reporting to Bob Lachky, vice president of brand management and director, global brand creative, on everything except creative strategy and development.

Personnel, brands, agencies

Corporate: August A. Busch III, chmn; Patrick Stokes, pres & CEO; John Jacob, exec VP-global comms; Joe Castellano, VP-corp HR; Francine Katz, VP-comms & cons affairs; John Kaestner, VP-corp affairs; Terri Vogt, VP-comms; August A. Busch IV, pres-Anheuser-Busch; Don Massey, dir-opers & office pres; Bob Lachky, VP-brand mgmt & dir-global brand creative; Mike Owens, VP-sls & mktg; Keith Levy, VP-retail mktg; Tony Ponturo, VP-global media & sports mktg; Peter McLoughlin, VP-corp media; Jim Schumacker, VP-creative devel & adv svcs; Tim Schoen, VP-presence mktg; John Marota, grp VP-retail creative svcs; Denny Galati, dir-tactical mktg; Steve Uline, grp dir-sports mktg & Bud sports; Pat McGauley, sr dir-high end brands; Dan Hoffmann, dir-retail sls promo; Andy Goeler, sr dir-Budweiser mktg; Dan McHugh, sr dir-Bud Light mktg; Rick Leininger, dir-Michelob family & specialties; Danny Scott, dir-tactical brands; Don Meyer, dir-new prods.

DDB Worldwide Communications, Chicago. Steve Jackson, ww acct dir. — Bud Light, Budweiser, Busch family, Michelob Ultra, cons awareness.

DDB Worldwide Communications, Toronto. Jeff McCrory, dir-clients svcs; Tim Binkley, acct dir. — Bud Light, Budweiser, Doc Otis Hard Lemon.

Downtown Partners, Toronto. Jeff McCrory, dir-client svcs; Tim Binkley, acct dir. — Budweiser, Bud Light.

Fusion Idea Lab, Chicago. Mike Oberman, ptrn; Matt Brennock, ptrn. — Bud Light, Budweiser.

Goodby, Silverstein & Partners, San Francisco. Tanin Blumberg, acct mgr. — Budweiser, Bud Light.

Hill, Holliday, Connors, Cosmopolis, Boston. Mike Sheehan, CEO; Marty Donahue, creative dir; Bryan Sweeney, exec producer. — Budweiser, Anheuser World Select.

Martin/Williams, Minneapolis. Stacy Janicki, acct super. — Michelob Golden.

Momentum, St. Louis. Denny Reed, acct dir. — Bacardi Silver, Michelob family.

Modernistal, Boston. Cliff Jones, pres; Lance Jensen, co-founder; Gary Koepke, co-founder.

Brado Cuneo, St. Louis. Bob Cuneo, ptrn; Steve Nollau, ptrn. — special projects.

Dieste, Harmel & Partners, Dallas. Sylvia Galvan, acct super. — Hispanic adv, Bud Light.

Del Rivero Messianu DDB, Miami. Angela Battistini, VP-acct svcs; Beatriz Orozco, acct exec; Enrique Faillace, creative dir; Luis Messianu, chief creative officer. — Hispanic adv, Bud Light, Budweiser.

DNA Studio, Beverly Hills, Calif. Josh Moshay, CEO. — interactive mktg.

Kupper Parker Communications, St. Louis. John Tolson, acct super. — special projects, cons awareness & education.

Waylon Ad, St. Louis. Jim Palumbo, pres; Kip Monroe, creative dir. — special projects.

Busch Entertainment: 231 S. Bemiston, Ste. 600, Clayton, Mo. 63105/Phone: (314) 577-2000. Keith M. Kasen, chmn; Robin D. Carson, corp VP-mktg; Linda Smith, VP-brand mgmt; Dan Dipiazza, VP-cons mktg; Shannon Rodriguez, dir-mktg; Fred Jacobs, sr dir-comms; Marcy Miles, dir-brand mgmt.

DDB Worldwide Communications, Chicago. Ramona Biliunas, VP & mgmt rep. — Adventure Island, Busch Gardens Tampa Bay, Busch Gardens Williamsburg, Discovery Cove, Sea World Orlando, Sea World San Antonio, Sea World San Diego, Sesame Place, Water Country USA.

84 AstraZeneca

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$85,641	\$48,479	76.7
Sunday magazine	18,119	10,396	74.3
Newspaper	316	1,487	-78.8
National newspaper	607	693	-12.5
Outdoor	455	30	NA
Network TV	110,709	108,878	1.7
Spot TV	1,381	540	155.6
Syndicated TV	12,586	12,989	-3.1
Cable TV networks	17,245	12,566	37.2
Network radio	9,318	4,093	127.7
National spot radio	1,504	473	217.9
Internet	15,884	8,098	96.1
Business publications	904	1,300	-30.5
Local magazines	90	47	92.3
Measured media	274,757	210,069	30.8
Unmeasured media	129,546	99,046	30.8
Total	404,303	309,115	30.8
By brand	2003	2002	% chg
Nexium heartburn Rx	227,470	198,066	14.8
Arimidex breast cancer Rx	22,525	1,389	1522.1
Rhinocort Aqua nasal Rx	15,818	4,180	278.5

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$18,849	\$17,841	5.6
Earnings	4,111	4,356	-5.6
Americas	2003	2002	% chg
Sales	9,835	10,287	-4.4
Operating profit	816	1,473	-44.6
Division sales	2003	2002	% chg
Pharmaceuticals	18,849	17,841	5.6

Headquarters

AstraZeneca/15 Stanhope Gate, London, United Kingdom W1K 1LN/Phone: 207-304-5000.

AstraZeneca/1800 Concord Pike, P.O. Box 15437, Wilmington, Del. 19850-5437/Phone: (302)886-3000.

Personnel, brands, agencies

Corporate: Sir Tom McKillop, chief exec; David Brennan, pres & CEO-AstraZeneca US; Tony Zook, sr VP-commercial ops.

Saatchi & Saatchi Healthcare, New York. Sam Welch, exec VP & mg dir. — Nexium, Seoquel, Entocort, Merrem.

Medicus, New York. Scott Shevrin, sr VP & grp acct dir; Heidi Forman, sr VP & grp acct dir. — Arimdex, Rhinocort.

Zenith Media, New York. Neil Ascher, exec VP & dir comms svcs. — media svcs.

UniWorld Group, New York. Byron Lewis, chmn & CEO. — African-American adv.

68 AT&T Corp.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$12,245	\$14,357	-14.7
Sunday magazine	3,220	1,395	130.8
Newspaper	15,105	22,861	-33.9
National newspaper	2,928	9,593	-69.5
Outdoor	3,433	8,449	-59.4
Network TV	46,228	103,238	-55.2
Spot TV	51,538	56,309	-8.5
Syndicated TV	9,994	16,538	-39.6
Cable TV networks	55,079	121,844	-54.8
Network radio	5,730	9,780	-41.4
National spot radio	8,290	12,152	-31.8
Internet	2,098	4,515	-53.5
Yellow Pages	8,000	9,000	-11.1
Spanish-language TV	39,247	56,604	-30.7
Business publications	1,053	3,043	-65.4
Local magazines	7	173	-96.0
Measured media	264,194	449,849	-41.3
Unmeasured media	214,505	365,242	-41.3
Total	478,700	815,091	-41.3
By brand	2003	2002	% chg
AT&T telecommunications	230,113	405,645	-43.3
10-10-345 long distance svc	24,606	32,369	-24.0

Sales & earnings (\$ in millions)

Worldwide & U.S.	2003	2002	% chg
Sales	\$34,529	\$37,827	-8.7
Earnings	1,865	-13,082	NA

Headquarters

AT&T Corp./One AT&T Way, Bedminster, N.J. 07921-0752/Phone: (908) 221-2000.

Personnel, brands, agencies

Corporate: David Dorman, chmn & CEO; Connie Weaver, exec VP-PR, mktg & brand.

Y&R Brands/Wunderman, New York. June Blockin, vice chmn.

Mediaedge:cia Worldwide, New York. Charles Courtier, exec chmn-ww; Lee Doyle, mg ptrn & client svcs dir; Cathy Goodin, mg ptrn & acct dir. — media svcs.

Bravo Group, New York. Daisy Exposito-Ulla, chmn & CEO. — Hispanic adv.

Kang & Lee, New York. Cynthia Park, exec VP. — Asian-American adv.

Serino Coyne, New York. Roger Micone, acct grp dir. — arts sponsorship.

UniWorld Group, New York. Byron Lewis, chmn & CEO. — African-American adv, Hispanic adv.

AT&T Business: One AT&T Way, Bedminster, N.J. 07921/Phone: (908) 221-2000. William Hannigan, pres; Elroy Cartwright, VP-mktg comms.

Y&R Brands/Wunderman, New York. June Blockin, vice chmn. **Mediaedge:cia Worldwide**, New York. Charles Courtier, exec chmn-ww; Lee Doyle, mg ptnr & client svcs dir; Cathy Goodin, mg ptnr & acct dir. — media svcs.

Bravo Group, New York. Ellen Gutierrez, acct dir. — Hispanic adv.

UniWorld Group, New York. Byron Lewis, chmn & CEO. — African-American adv, Hispanic adv.

AT&T Consumer: 340 Mt. Kemble Ave., Morristown, N.J. 07692/Phone: (908) 221-2000. John Polumbo, pres & CEO; Tim Omaggio, VP-mktg svcs.

Y&R Advertising, New York. June Blockin, vice chmn. — 10-10-345 long distance, AT&T telecommunications.

Wunderman, New York. Jennifer Matthews, sr VP & grp acct dir. — WorldNet Service.

Mediaedge:cia Worldwide, New York. Charles Courtier, exec chmn-ww; Lee Doyle, mg ptnr & client svcs dir; Cathy Goodin, mg ptnr & acct dir. — media svcs.

Digitas, Boston. David Kenny, chmn & CEO; Robert Hurley, exec VP-mktg. — direct mktg.

Bravo Group, New York. Ellen Gutierrez, acct dir. — Hispanic adv.

Kang & Lee, New York. Cynthia Park, exec VP. — Asian-American adv.

UniWorld Group, New York. Byron Lewis, chmn & CEO. — African-American adv.

31 AT&T Wireless

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$41,790	\$14,687	184.5
Sunday magazine	14	NA	NA
Newspaper	462,117	382,605	20.8
National newspaper	48,292	36,806	31.2
Outdoor	12,973	12,731	1.9
Network TV	111,099	56,746	95.8
Spot TV	32,654	86,943	-62.4
Syndicated TV	14,216	4,768	198.1
Cable TV networks	36,428	26,895	35.4
Network radio	1,131	2,092	-45.9
National spot radio	38,488	43,814	-12.2
Internet	14,813	20,171	-26.6
Spanish-language TV	2,233	18	NA
Business publications	836	886	-5.7
Local magazines	NA	26	NA
Measured media	817,085	689,188	18.6
Unmeasured media	217,777	183,688	18.6
Total	1,034,862	872,877	18.6
By brand	2003	2002	% chg
AT&T Wireless telecomms	805,771	667,101	20.8

Sales & earnings (\$ in millions)

Worldwide & U.S.	2003	2002	% chg
Sales	\$16,695	\$15,631	6.8
Earnings	429	-2,342	NA
Division sales	2003	2002	% chg
Wireless voice & data svcs	16,695	15,631	6.8

Headquarters

AT&T Wireless/7277 164th Ave., N.E., Building 1, Redmond, Wash. 98052/Phone: (425) 580-6000.

Notes

Cingular Wireless is buying AT&T Wireless for \$41 billion in a deal expected to close by the end of the year. Cingular is 60% owned by SBC Communications.

Personnel, brands, agencies

Corporate: John D. Zeglis, chmn & CEO; G. Michael Sievert, exec VP & chief mktg officer; Neve Savage, VP-mktg & comms.

Mediaedge:cia Worldwide, New York. Charles Courtier, exec chmn ww; Lee Doyle, mg ptnr & client svcs dir; Margaret Lewis, mg ptnr & acct dir. — media svcs.

Avenue A, Seattle. Clark M. Kokich, pres. — Internet mktg.

Bravo Group, New York. Mary Miqueli, VP & gm. — Hispanic adv.

73 Aventis

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$87,733	\$86,924	0.9
Sunday magazine	3,946	9,149	-56.9
Newspaper	116	148	-21.7
National newspaper	521	2,460	-78.8
Outdoor	37	48	-21.6
Network TV	43,500	42,221	3.0
Spot TV	3,540	2,602	36.0
Syndicated TV	7,519	9,631	-21.9
Cable TV networks	18,992	14,566	30.4
Network radio	1,278	9,329	-86.3
National spot radio	862	1,499	-42.5
Internet	3,997	3,611	10.7
Business publications	997	1,124	-11.3
Local magazines	139	11	NA
Measured media	173,177	183,323	-5.5
Unmeasured media	285,928	302,680	-5.5
Total	459,104	486,003	-5.5
By brand	2003	2002	% chg
Allegra allergy Rx	120,807	134,826	-10.4
Aventis pharmaceuticals	20,164	13,856	45.5
Nasacort Nasal Rx	13,472	11,278	19.5
Penlac nail Rx	11,776	10,446	12.7

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$20,333	\$19,596	3.8
Earnings	2,170	1,987	9.2
North America	2003	2002	% chg
Sales	9,096	8,732	4.2
Division sales	2003	2002	% chg
Prescription drugs	17,337	15,228	13.8
Human vaccines	1,850	1,501	23.3
Other	1,194	2,914	-59.0

Headquarters

Aventis/Espace Europeen de l'Entreprise, 16, ave. de l'Europe, Strasbourg, France 67917/Phone: 33-3-88-99-11-00.

Aventis/300 Somerset Corporate Blvd., Bridgewater, N.J. 08807-2854/Phone: 908-231-4000.

Notes

Aventis, a French-Germany company, in late April 2004 accepted a sweetened bid of \$65 billion (up from \$59 billion) from Paris-based Sanofi-Synthelabo, keeping the pharmaceutical company largely a French operation and thereby satisfying the French government request that the pharmaceutical giant retain its French home. The sweetener came shortly after Swiss drug maker Novartis indicated its interest in entering merger talks with Aventis. The combo, with about \$30 billion in revenue, becomes the third largest drug manufacturer behind leader Pfizer and GlaxoSmithKline.

Personnel, brands, agencies

Corporate: Igor Landau, chmn; Richard J. Markham, vice chmn & chief operating officer.

Aventis Pharmaceuticals: 300-400 Somerset Corp. Blvd., Bridgewater, N.J. 08807-2854/Phone: (908) 243-6000. Gerald P. Belle, pres-N. Amer. ops; Jurgen Lasowski, VP-bus devel & strategy; Charles F. Rouse, VP-N. Amer. comms & corp relations.

Euro RSCG Life LM&P, New York. Carmine Laliberte, pres; Grace Fenton, sr VP & dir-client svcs. — Nasacort AQ.

Euro RSCG Life MetaMax, New York. Doug Burcin, pres; Tony Pisciotta, ww team leader. — Apidra, Arava, Lantus.

Euro RSCG Worldwide, New York. Larry Pollare, grp acct dir. — cons awareness adv, Lantus.

Harrison & Star Business Group, New York. Ane Jones, global acct dir. — Taxotere.

McCann Erickson Worldwide, New York. Andrew Schirmer, exec VP. — Allegra (cons).

Starcom, Chicago. Nancy Ryan, sr VP & media dir. — media svcs.

In-house. — media svcs, (prof).

Dermik Laboratories: 1050 West Lakes Dr., Berwyn, Pa. 19312/Phone: (484) 595-2700. John Leone, pres-Aventis Dermatology/Dermik; Joe Balzer, VP-sls & mktg.

Saatchi & Saatchi Innovations, Langhorne, Pa. Bruce Medd, exec VP-mg dir. — Carac, Dermatop.

Donahoe Purohit Miller Advertising, Chicago. Sharon Robinson, sr acct exec; Laurie Mack, acct exec. — BenzaClin, Klaron, Noritate, Penlac, Psorcon-e.

76 Bayer**U.S. ad spending (\$ in thousands)**

By media	2003	2002	% chg
Magazine	\$15,054	\$13,639	10.4
Sunday magazine	2,191	576	280.3
Newspaper .....	.433	366	18.4
National newspaper .....	.751	325	131.4
Outdoor	1,076	728	47.8
Network TV	93,899	87,710	7.1
Spot TV	13,551	9,015	50.3
Syndicated TV	34,150	34,309	-0.5
Cable TV networks	42,486	30,408	39.7
Network radio	8,490	2,821	200.9
National spot radio	2,986	2,256	32.3
Internet	2,102	2,096	0.3
Spanish-language TV	3,297	3,647	-9.6
Business publications	1,315	1,260	4.4
Measured media	221,782	189,155	17.2
Unmeasured media	212,715	181,422	17.2
Total	434,497	370,577	17.2

By brand	2003	2002	% chg
Aleve pain remedy .....	.62,076	50,409	23.1
Bayer pain remedies .....	.52,513	49,420	6.3
Alka-Seltzer remedies .....	.32,312	26,901	20.1
One-A-Day vitamins .....	.30,130	16,977	77.5
K9 Advantix pet medicine ...	.19,867	0	NA

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$32,604	\$28,149	15.8
Earnings	-1,553	1,007	NA
North America	2003	2002	% chg
Sales .....	.7,567	7,890	-4.1
Division sales	2003	2002	% chg
Polymers .....	.11,296	9,714	16.3
Health care .....	.10,125	8,905	13.7
CropScience .....	.6,578	4,463	47.4
Chemicals .....	.3,881	4,107	-5.5

Headquarters

Bayer/Bayerwerk, 5368 Leverkusen, Germany /Phone: 49-214-301.

Bayer/Bayer Corp., 100 Bayer Rd., Bldg. 4, Pittsburgh, Pa. 15205-9741/Phone: (412) 777-2000.

Notes

Bayer acquired Aventis' CropScience business in 2002, and sold its household insecticide business to SC Johnson in early 2003.

Personnel, brands, agencies

Corporate: Manfred Schneider, chmn-Bayer A.G.; Helge H. Wehmeier, pres & CEO-U.S.; J. Kolpon, VP-mktg.

DDB Worldwide Communications, New York. Ellen Fields, grp acct dir. — Science Literacy Program.

BBDO Worldwide, Chicago. Anne Dooley, exec VP & client svc dir.

Initiative Media North America, New York. Larry Orell, exec VP & gm. — media buying.

Agriculture Division: 8400 Hawthorn Rd., P.O. Box 4913, Kansas City, Mo. 64120-0013/Phone: (816) 242-2000. Emil E. Lansu, pres-agriculture div; Jeff Pelaccio, mg-customer advocacy, crop protection prods; Dan Carrothers, dir mktg-garden & prof care prods; Alfred Amend, VP-mktg & sls; Joseph Rainone, VP-mktg & new prods; Mark Schneid, dir mktg-Bayer Advanced.

BBDO Atlanta, Atlanta. Stephen Weinstein, mgmt super. — Bayer Advanced.

Initiative Media North America, New York. Larry Orell, exec VP & gm. — media buying, Advanced Flea Control.

Animal Health Division: 12707 Shawnee Mission Pkwy., Shawnee, Kan. 66216/Phone: 913-268-2000. Jeff Gaidos, VP-mktg; Glenn Watson, VP-sls; Jim McNair, VP-new bus devel & admin.

Bernstein-Rein Advertising, Kansas City, Mo. Dave Lubeck, sr VP & dir-client svcs. — K9 Advantix pet medicine.

Initiative Media Worldwide, New York. — media buying, Advantage Flea Control.

Bayer HealthCare, Diagnostics Self Testing Systems: 1885 Miles Ave., Elkhart, Ind. 46515/Phone: (574) 264-8893. Joe Martin, div head; Nancy Dean, VP-global mktg-Ascensia blood glucose monitors; Joseph Malta, head N. Amer. mktg-Ascensia blood glucose monitors.

Lyons Lavey Nickel Swift, New York. Melissa Gelade, sr acct exec.

No agency. — media buying, Ascenzia Breeze, HIV, hepatitis, laboratories.

Biological Products: 4101 Research Commons, 79 T.W. Alexander Dr., Research Triangle Park, N.C. 27709/Phone: (919) 316-6396. Joel Abelson, VP-global strategic mktg; Mike Mathews, VP-global strategic mktg-coagulation; Bernhard Schaefer, VP-global strategic mktg-vascular, intensive care & pulmonology.

Consumer Care Division: 36 Columbia Rd., P.O. Box 1910, Morristown, N.J. 07962-1910/Phone: (973) 254-5000. Gary S. Balkema, gm-cons care bus grp; Timothy G. Hayes, sr VP & region head-N. Amer.

BBDO Chicago, Chicago. Anne Dooley, exec VP & client svc dir. — Bayer Aspirin, Aleve, Aleve Cold & Sinus, One-A-Day, Flintstones Vitamins, Bugs Bunny Vitamins, Alka-Seltzer antacid, Alka-Seltzer Plus cold medicine, RID lice treatment, Neo-Syneprine, Midol, Phillips' Milk of Magnesia.

OMD Worldwide, New York & Chicago. Eve Leshaw, plng/print-New York; Deb Nevin, media plng-Chicago. — media plng.

Initiative Media North America, New York. Larry Orell, exec VP & gm. — media buying, Aleve, Aleve Cold & Sinus, Alka Seltzer, Alka Seltzer Plus, One-A-Day Vitamins, Flintstone Vitamins, Bayer Aspirin, Midol, Phillips Milk of Magnesia.

Pharmaceutical Division: 400 Morgan Lane, West Haven, Conn. 06516/Phone: (203) 812-2000. Stefan Oetrich, VP-mktg; David Stellingworth, VP-sls; Donna Conder-Flannery, VP-bus ops & analysis; Nancy Bryan, VP-mktg, men's health; Laura Malis, mgr-div comms.

CommonHealth, Parsippany, N.J. Matt Giegerich, pres & CEO-CommonHealth; Stuart Klein, pres-Quantum Group (a CommonHealth co.) — Levitra (co-marketed with GlaxoSmithKline pharmaceutical div).

Dudnyk Healthcare West, San Francisco. Robin Mueller, acct mgr. — Coagulation-Koate, Kogenate.

Lyons Lavey Nickel Swift, New York. Joe Noel, sr VP & grp acct super. — Avelox, Bayer Biologicals, Bayer Oncology, Cipro IV, Cipro Tablets, Trasylol.

Initiative Media Worldwide, New York. — media buying, Levitra.

90 BellSouth Corp.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$3,465	\$1,692	104.8
Sunday magazine	157	NA	NA
Newspaper	23,799	13,832	72.1
National newspaper	1,532	1,989	-23.0
Outdoor	1,249	1,767	-29.3
Network TV	6,690	4,356	53.6
Spot TV	58,732	31,908	84.1
Cable TV networks	43	1,311	-96.7
National spot radio	21,592	11,390	89.6
Internet	422	317	33.1
Yellow Pages	6,158	5,273	16.8
Business publications	2,039	843	141.9
Local magazines	62	84	-26.3

U.S. ad spending (\$ in thousands)

Measured media	125,938	74,761	68.5
Unmeasured media	249,655	148,204	68.5
Total	375,593	222,965	68.5
By brand	2003	2002	% chg
BellSouth telecom svcs	117,690	67,812	73.6

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$22,635	\$22,440	0.9
Earnings	3,904	1,323	195.1
U.S.	2003	2002	% chg
Sales	20,337	20,202	0.7
net income	3,743	1,215	208.1
Division sales	2003	2002	% chg
Wireline Communications	18,448	18,489	-0.2
Latin America Group	2,298	2,238	2.7
Advertising & publishing	2,050	2,157	-5.0

Headquarters

BellSouth Corp./1155 Peachtree St., N.E., Atlanta, Ga. 30309-3610/Phone: (404) 249-2000.

Personnel, brands, agencies

Corporate: F. Duane Ackerman, chmn & CEO; William Pate, VP-adv & PR; F. Alan Blount, asst VP-corp adv; Marci Raible, sr dir-media.

BellSouth Advertising & Publishing Co. (BAPCO): 2247 North Lake Pkwy., Tucker, Ga. 30084/Phone: (678) 406-0885. Elmer L. Smith, pres-BAPCO; Cathy Linton, dir-adv.

WestWayne, Atlanta. Will Thomason, exec VP & grp acct dir. **BreathelInteractive**, Atlanta. Heidi Klein, mg ptrn. — interactive mktg.

Initiative Media Worldwide, Atlanta. Rob Claxton, exec VP & gm. — media svcs.

IAC Group, Atlanta. Gabriela Alcantara Diaz, exec VP. — Hispanic adv.

BellSouth Communications: 1025 Lennox Park Blvd, Rm C764, Atlanta, Ga. 30319/Phone: (404) 249-2000. Marci Raible, sr dir-small bus; Kerry Trivers, dir-cons adv; Cathy Linton, dir-large bus adv; Dave Cygan, dir-DSL adv.

Bromley Communications, Miami. Ana Eberhard, grp acct dir.

Initiative Media Worldwide, Atlanta. Rob Claxton, exec VP & gm. — media svcs.

BreathelInteractive, Atlanta. Erin Pennington, mg ptrn. — interactive mktg.

Matlock Advertising & Public Relations, Atlanta. Renee Ford Clark, mg dir. — African-American adv.

78 Berkshire Hathaway

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$27,708	\$29,205	-5.1
Sunday magazine	1,644	1,616	1.7
Newspaper	7,311	5,925	23.4
National newspaper	1,859	4,266	-56.4
Outdoor	3,578	3,486	2.7
Network TV	30,717	30,457	0.9
Spot TV	60,578	55,546	9.1

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Syndicated TV	26,844	20,831	28.9
Cable TV networks	57,139	47,476	20.4
Network radio	8,737	9,571	-8.7
National spot radio	27,884	26,400	5.6
Internet	3,430	3,192	7.5
Business publications	2,191	2,079	5.4
Local magazines	17	100	-83.3
Measured media	259,636	240,148	8.1
Unmeasured media	171,219	158,368	8.1
Total	430,855	398,516	8.1
By brand	2003	2002	% chg
Geico insurance	166,953	147,740	13.0
Dairy Queen restaurants	35,441	38,772	-8.6
Benjamin Moore paints	20,798	21,493	-3.2
Helzberg jewelers	13,046	10,550	23.7

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$63,859	\$42,353	50.8
Earnings	8,151	4,286	90.2
U.S.	2003	2002	% chg
Sales	44,620	30,712	45.3
Division sales	2003	2002	% chg
Insurance group	24,731	22,249	11.2
McLane Co.	13,743	NA	NA
Shaw Industries (carpet)	4,660	4,334	7.5
Building products	3,846	3,702	3.9
Finance & financial products	3,073	2,234	37.6
Other businesses	3,040	2,375	28.0
Flight services	2,431	2,837	-14.3
Retail operations	2,311	2,103	9.9
Apparel	2,075	1,619	28.2

Headquarters

Berkshire Hathaway/1440 Kiewit Plaza, Omaha, Neb. 68154/Phone: (402) 346-1400.

Notes

Berkshire Hathaway went on the acquisition trail in 2003 paying \$1.5 billion for McLane Co., a Temple, Texas-based food distribution company owned by Wal-Mart Stores, and in early 2004 agreed to buy Clayton Homes for \$1.7 billion. Clayton Homes, based in Knoxville, Tenn., is a leader in manufactured housing.

Personnel, brands, agencies

Corporate: Warren Buffett, chmn & CEO.

Acme Building Brands: 2821 W. Seventh, Fort Worth, Texas 76107-2219/Phone: (817) 390-2409. Harrold Melton, pres & CEO; Bill Seidel, VP-mktg & adv.

Felzware, Fort Worth, Texas. Matt Felzware, pres. — media buying.

Ben Bridge Jeweler: P.O. 1908, Seattle, Wash. 98111/Phone: (206) 448-8800. John Bridge, vice chmn & co-CEO; Ed Bridge, pres & co-CEO; Steve Davolt, VP-mktg.

Publicis Seattle, Seattle. Matt Stiker, sr VP-grp acct dir.

Benjamin Moore: 51 Chestnut Ridge Rd., Montvale, N.J. 07645/Phone: (800) 344-0400. Ivan Dupuy, pres & CEO; Denis Abrams, exec VP & chief operating officer.

Gianettino & Meredith Advertising, Short Hills, N.J. Rick

Riccardi, VP & acct super. — Benjamin Moore Paint.

Borsheim's Jewelry: 120 Regency Pkwy., Omaha, Neb. 68114/Phone: (402) 391-0400. Susan M. Jacques, pres & CEO; Adri Geppert, dir-adv & mktg.

Bailey Lauerman, Lincoln, Neb. Tim Geisert, vp-acct mgmt.

Buffalo News: One News Plaza, Buffalo, N.Y. 14240/Phone: (716) 849-3434. Stanford Lipsey, pub; Warren T. Colville, pres; Phil Maher, dir-mktg.

Schutte Group, Buffalo, N.Y. Suzanne Schutte, principal.

Media Pros, Orchard Park, N.Y. Bob Dobmeier, pres. — media buying.

Clayton Homes: 5000 Clayton Rd., Maryville, Tenn. 37804/Phone: (865) 380-3000. Kevin T. Clayton, pres & CEO; Chris Nicely, VP-mktg.

In-house. — Agencies assigned on a project basis.

CORT Business Services: 11250 Waples Mill Rd., Ste. 500, Fairfax, Va. 22030/Phone: (703) 968-8500. Paul Arnold, CEO; Steve Jobs, pres; Lloyd Lenson, chief operating officer.

Arnold Worldwide, McLean, Va. Michael White, sr VP & acct dir.

Fruit of the Loom Industries: One Fruit of the Loom Dr., Bowling Green, Ky. 42103/Phone: (207) 781-6400. John B. Holland, pres & CEO; John W. Shivel, VP-adv & corp comms.

Richards Group, Dallas. Diane Fannon, principal; Dennis Walker, creative grp head; Ron Henderson, creative grp head; Mary Price, media svcs. — media svcs, Best by Fruit of the Loom, BVD, Fruit of the Loom, FunGals, FunPals, Lofteez, Underoos.

Grupo Gallegos, Long Beach, Calif. John Gallegos, principal. — Hispanic adv.

Garan: 350 Fifth Ave., 19th fl., New York, N.Y. 10118/Phone: (212) 563-2000. Seymour Lichtenstein, chmn; Jerry Kamiel, pres.

No agency.

Geico: Government Employee's Insurance Co., 1 Geico Plaza, Washington, D.C. 20076/Phone: (800) 824-5404. Tony Nicely, pres & CEO; Edward W. Ward, VP-mktg.

Martin Agency, Richmond, Va. Paul McKee, exec VP & chief operating officer. — Geico Direct auto insurance.

Lopez Negrete Communications, Houston. Alex Lopez Negrete, pres & CEO. — Hispanic adv.

H.H. Brown Shoe Group: 124 W. Putnam Ave., Greenwich, Conn. 06830/Phone: (203) 661-2424. Frank Rooney, chmn; Jim Issler, pres & chief operating officer.

In-house. — Born Shoe Co., Acme Boot, Bolo, Brunswick Footwear, Carolina Shoe Co., Cove Shoe Co., Dexter Shoe Co., Double-H Boot, HH Brown Shoes, Honda Footwear, Soffit Shoe, Nursemates, Orvis, Quark, Softspots, Supremes.

Helzberg Diamond Shops: 1825 Swift, North Kansas City, Mo. 64224/Phone: (800) 669-7780. Jeff Comment, chmn; John Goodman, sr VP-mktg & adv; Linda Baker, adv dir.

Doner, Southfield, Mich. Alan Kalter, chmn & CEO; Jennifer Sproul, VP.

International Dairy Queen: 7505 Metro Blvd., P.O. Box 39286, Edina, Minn. 55439/Phone: (952) 830-0200. Charles W. Mooty, pres & CEO; Michael Keller, exec VP-mktg.

Grey Worldwide, New York. Rick Cusato, exec VP-acct dir. — Dairy Queen restaurants.

MediaCom, New York. Larry Sawyer, exec VP & grp dir. — media buying.

Johns Manville: 717 17th St., Denver, Colo. 80217-5108/Phone: (303) 978-2000. Steven B. Hochhauser, chmn, pres & CEO; Melody Dunbar, mgr-corp relations.

Brozena Schaller Menaker & Ripley, Denver. Ed Brozena, pres & CEO; Joe Kramer, sr acct dir. — air handling systems, commercial & ind roofing, engineered products, fire protection systems, pipe & equipment insulations.

McClain Finlon Advertising, Denver. Martin Knapp, acct exec; Brian Macintosh, acct super. — Formaldehyde-free product line, Comfort Therm, EasyFit.

Tailwinds Marketing, Denver. Judy Forbes, principal. — commercial & industrial roofing systems.

Jordan's Furniture: 100 Stockwell Dr., Avon, Mass. 02322/Phone: (508) 580-4900. Barry Tatelman, pres; Heather Copelas, dir-pr.

Blitz Media, South Natick, Mass. Marci Cohen, pres.

Justin Brands: 610 W. Daggett, Fort Worth, Texas 76104/Phone: (817) 332-4385. Randy Watson, pres & CEO; Armando Romero, dir-adv.

Balcom Agency, Fort Worth, Texas. Stuart Balcom, pres; Deanna Lewis, acct exec; Trey Sprinkle, art dir. — Justin Boots, Justin Original Work Boots, Tony Lama Boots, Nocona Boots, Chippewa Footwear.

MidAmerica Energy Holdings: 666 Grand Ave., Des Moines, Iowa 50309/Phone: (515) 242-4300. Greg E. Abel, pres; Jack Kelleher, vp-mktg & sls.

Bozell & Jacobs, Omaha. Kim Mekelson, sr ptrn; Kevin Hutchinson, acct exec.

Nebraska Furniture Mart: 700 S. 72nd St., Omaha, Neb. 68114/Phone: (402) 397-6100. Irv Blumkin, chmn & CEO; Mark Hamilton, dir-mktg; Teri Harold, adv mgr.

Red Stone Communications, Omaha. Gail Johnston, VP.

In-house. — media buying.

NetJets: 581 Main St., Woodbridge, N.J. 07095/Phone: (877) 356-5823. Richard

T. Santulli, chmn & CEO; Steve Zacks, sr VP-mktg.

Kirshenbaum Bond, New York. Jonathan Bond, co-chmn. — direct mail, NetJets fractional ownership program.

Pampered Chef: One Pampered Chef Lane, Addison, Ill. 60101-5630/Phone: (630) 261-8900. Doris Christopher, founder & CEO; Marla Gottschalk, pres & chief operating officer.

No agency.

R.C. Willey Home Furnishings: 2301 S. 300 West, Salt Lake City, Utah 84115/Phone: (801) 461-3900. Scott Hymas, CEO; Bill Child, chmn; Clark Yospe, vp-mktg.

In-house.

Scott Fetzer Cos.: 28800 Clemens Rd., Westlake, Ohio 44145/Phone: (440) 892-3000. Campbell Hausfeld: Gary Heeman, pres-Air Prods; Bob Bicknell, sr VP-sls & mktg; Steve Carroll, bus mgr-power prods; Dan Sanchez, mgr-mktg comms; Hilarie Meyer, dir-mktg; Douglas Quikut: Nathan Howard, gm; World

Book Encyclopedia: Robert Hall, VP-N. Amer. sls.

McNabb Kelley & Barre, Jonesboro, Ark. Chris Barre, ptrn. — Ginsu Knives.

Odell Advertising/Marketing, North Canton, Ohio. Dean Crawford, VP-sls. — American Angler.

In-house. — media buying, media & print, Campbell-Hausfeld, Child Craft, Early World of Learning, World Book Multimedia, World Book Encyclopedia, World Book Online Reference Center.

See's Candies: 210 El Camino Real, South San Francisco, Calif. 94080/Phone: (650) 583-7307. Charles N. Huggins, pres; Richard Van Doren, VP-mktg.

Euro RSCG Worldwide (Black Rocket), San Francisco. Dana Losinno, media dir; Chris Chaffin, creative dir.

Shaw Industries: 616 E. Walnut Ave., Dalton, Ga. 30722/Phone: (706) 278-3812. Robert Shaw, chmn & CEO; Julian D. Saul, pres; C.K. Bevil, dir-mktg comms.

In-house.

Star Furniture: 16666 Barker Springs Rd., Houston, Texas 77084/Phone: (281) 492-6661. Mark Scriber, pres; Mike Galloway, adv dir.

Yaffe/Deutser, Houston. Brad Deutser, pres. — bdcst adv.

39 Best Buy Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$29,560	\$25,676	15.1
Newspaper	139,568	164,355	-15.1
National newspaper	10,554	6,893	53.1
Outdoor	482	219	119.8
Network TV	52,463	51,562	1.7
Spot TV	45,546	43,414	4.9
Cable TV networks	24,864	13,425	85.2
Network radio	300	1,955	-84.7
National spot radio	131	77	69.5
Internet	16,881	6,776	149.1
Spanish-language TV	3,143	1,828	71.9
Business publications	1,449	1,443	0.5
Measured media	324,941	317,623	2.3
Unmeasured media	512,608	501,064	2.3
Total	837,548	818,687	2.3
By brand	2003	2002	% chg
Best Buy retail stores	322,202	313,146	2.9

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$24,547	\$20,946	17.2
Earnings	705	99	612.1
U.S.	2003	2002	% chg
Sales	23,243	19,303	20.4
Operating income	1,267	1,002	26.4

Headquarters

Best Buy Co./7601 Penn Ave. S., Richfield, Minn. 55423/Phone: (612)291-1000.

Notes

Best Buy sold Musicland Group in June 2003 to an affiliate of Sun Capital Partners. Musicland, treated as a discontinued operation for both fiscal years, was purchased in 2001, but did not meet Best Buy's financial expectations.

Personnel, brands, agencies

Corporate: Richard M. Schulze, founder & chmn; Brad Anderson, CEO & co-chmn; Michael Linton, exec VP & chief mktg officer; Barry Judge, VP-cons & brand mktg; Mary Miller, VP-cust loyalty mktg.

Best Buy (In-house) Ruby Anik, VP-adv; Ric West, VP-promo mktg.

Starcom, Chicago. John Muszynski, mg dir, investment & ops. — media buying-natl bdcst.

42 Bristol-Myers Squibb Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$74,919	\$74,101	1.1
Sunday magazine	9,872	18,032	-45.3
Newspaper	15,065	3,996	277.0
National newspaper	5,240	872	500.9
Outdoor	120	407	-70.5
Network TV	63,938	40,581	57.6
Spot TV	3,624	326	NA
Syndicated TV	21,232	11,351	87.1
Cable TV networks	30,895	10,884	183.9
Network radio	NA	1,715	NA
National spot radio	493	125	292.7
Internet	3,911	4,076	-4.0
Business publications	1,021	335	204.7
Measured media	230,329	166,801	38.1
Unmeasured media	547,740	396,663	38.1
Total	778,069	563,464	38.1
By brand	2003	2002	% chg
Plavix blood thinner Rx	77,838	53,601	45.2
Excedrin pain remedies	51,903	35,386	46.7
Pravachol cholesterol Rx	27,518	33,687	-18.3
Bristol-Myers Squibb Rx	24,687	2,278	983.5
Metaglip diabetes Rx	11,971	0	NA
Glucovance diabetes Rx	11,122	31,269	-64.4

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$20,894	\$18,106	15.4
Earnings	3,106	2,137	45.3
U.S.	2003	2002	% chg
Sales	12,897	11,348	13.6
Division sales	2003	2002	% chg
Pharmaceuticals	14,925	12,812	16.5
Oncology	2,241	1,900	17.9
Nutritionals	2,023	1,821	11.1
Other Healthcare	1,705	1,573	8.4

Headquarters

Bristol-Myers Squibb Co./345 Park Ave., New York, N.Y. 10154/Phone: (212) 546-4000.

Personnel, brands, agencies

Corporate: Peter Dolan, pres & CEO.

Mead Johnson Nutritionals: 2400 W. Lloyd Expy., Evansville, Ind. 47721/Phone: (812) 429-5000. Randall Alsman, pres.

Ogilvy & Mather Worldwide, New York. — Enfamil, Enfamil AR.

U.S. Pharmaceutical Group: 777 Scudders Mill Rd., Plainsboro, N.J. 08536/Phone: (609) 897-2000. Donald J. Heyden, exec VP & pres-Americas; Wendy Dixon, chief mktg officer; Tom Chetrick, VP-mktg svcs.

Euro RSCG Life Becker, New York. Terry Gallo, pres. — Pravachol.

Health@JWT, New York. — Glucophage, Glucovance, XR, Metaglip.

Gotham, New York. Marty Smith, vice chmn. — Comtrex, Keri hand lotion.

McCaffery Ratner Gottlieb & Lane, New York. Dave Gillies, acct mgr. — Bufferin, Vagisil.

Saatchi & Saatchi Healthcare, New York. Bob Hogan, exec VP & mg dir. — cons awareness adv, Plavix.

Under The Radar, Dobbs Ferry, N.Y. Jimmy Cohen, chmn; Tom Womback, pres. — Excedrin, Excedrin PM.

MindShare Worldwide, New York. AJ Storinge, grp plng dir. — media svcs.

62 Burger King Corp.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$3,543	\$8,244	-57.0
Newspaper	150	369	-59.3
National newspaper	343	1,939	-82.3
Outdoor	4,464	5,612	-20.5
Network TV	140,360	144,072	-2.6
Spot TV	16,868	32,376	-47.9
Syndicated TV	41,567	55,111	-24.6
Cable TV networks	48,499	55,795	-13.1
Network radio	1,245	4,046	-69.2
National spot radio	16,735	30,822	-45.7
Internet	861	962	-10.5
Spanish-language TV	19,501	24,289	-19.7
Business publications	92	1,071	-91.5
Local magazines	62	33	87.7
Measured media	294,291	364,740	-19.3
Unmeasured media	230,219	285,330	-19.3
Total	524,510	650,070	-19.3
By brand	2003	2002	% chg
Burger King restaurants	294,158	363,551	-19.1

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$11,100	\$11,300	-1.8
U.S.	2003	2002	% chg
Sales	7,900	8,600	-8.1

Headquarters

Burger King Corp./5505 Blue Lagoon Dr., Miami, Fla. 33126/Phone: (305) 378-3000.

Notes

Burger King President Robert Nilsen left the chain in February after 13 months on the job. During his tenure Burger King lost market share to both McDonald's and Wendy's. Worldwide and U.S. sales figures for Burger King are systemwide sales cited by Burger King. Burger King was sold at the turn of 2003 by Diageo to Texas Pacific Group, a U.S.-based private-equity firm.

Personnel, brands, agencies

Corporate: Bradley D. Blum, CEO; Russ Klein, chief mktg officer; John Chidsey, pres-N. Amer; Gladding Markunas, sr VP-cons insight & strategic branding.

Crispin Porter & Bogusky, Miami. Jeff Hicks, CEO.

MindShare Worldwide, New York. Shari Cohen, co-exec dir natl bdcst. — media svcs.

Bromley Communications, San Antonio. Jorge Flores, acct super. — Hispanic adv.

Campbell Mithun, Minneapolis. Tim Hawley, sr VP & gm. — kids/youth & family mktg.

Equity Marketing, Los Angeles. Gaetano Mastropasqua, pres. — sls promo.

Premium Surge, Chicago. Pam Crain, exec VP-client svcs. — sls promo.

VML, Kansas City, Mo. Matt Anthony, CEO. — interactive mktg.

UniWorld Group, New York. Byron Lewis, chmn & CEO. — African-American adv.

Wunderman, New York. Rick Schreuder, sr VP & acct svcs dir. — sls promo.

93 Cadbury Schweppes

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$7,666	\$6,110	25.5
Newspaper	138	490	-71.9
National newspaper	NA	132	NA
Outdoor	1,953	3,882	-49.7
Network TV	139,983	154,614	-9.5
Spot TV	9,172	14,757	-37.8
Syndicated TV	10,650	16,974	-37.3
Cable TV networks	42,557	44,087	-3.5
Network radio	1,620	12,104	-86.6
National spot radio	2,626	2,225	18.0
Internet	1,147	1,393	-17.6
Spanish-language TV	10,504	8,657	21.3
Business publications	2,317	2,368	-2.1
Measured media	230,333	267,792	-14.0
Unmeasured media	110,427	128,386	-14.0
Total	340,760	396,178	-14.0
By brand	2003	2002	% chg
Dr. Pepper soft drinks	95,681	89,718	6.6
Trident gum	34,101	40,101	-15.0
7 Up soft drinks	25,187	34,256	-26.5
Dentyne gum	23,783	26,831	-11.4
Hall's cough drops	21,339	22,919	-6.9
Snapple soft drinks	11,254	11,131	1.1

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$10,595	\$7,836	35.2
Earnings	0	811	NA
North America	2003	2002	% chg
Sales	4,417	0	NA
Operating profit	875	962	-9.0
Division sales	2003	2002	% chg
Americas beverages	2,984	3,244	-8.0
Cadbury Adams	1,433	382	275.1

Headquarters

Cadbury Schweppes/Cadbury Schweppes/PLC, 25 Berkeley Square, London, U.K. W1J 6HB/Phone: 44-171-409-1313.

Cadbury Schweppes/Americas Beverages/5301 Legacy Dr., Plano, Texas 75024/Phone: (972) 673-7000.

Notes

Cadbury Schweppes completed the acquisition of the Adams division of Pfizer in 2003 for \$4.2 billion. The division included

more than \$100 million in measured spending from Halls, Trident, Bubblicious, Chiclets, Freshen-Up, Dentyne, Certs and Clorets among the plethora of brands in that division.

Personnel, brands, agencies

Corporate: John Sunderland, exec chmn; Todd Stitzer, CEO.

Americas Beverages: 5301 Legacy Dr., Plano, Texas 75024/Phone: (972) 673-7000. Gilbert Cassagne, pres-Americas Beverages; Randy Gier, exec VP-mktg; Steve Jarmon, VP & ptrn-mktg; Jim Trebilcock, sr VP-cons mktg; Holly Mensch, VP-mktg, Snapple; Maura Mottoliese, VP-strategic bus; John Haydock, VP-mktg, Mott's; Chris Testa, VP-mktg, Nantucket Nectars; Alice Nolan, VP-media.

Boathouse Group, Needham Heights, Mass. Jeff Bucalo, ptrn. — Nantucket Nectars.

Cliff Freeman & Partners, New York. — Snapple.

Del Rivero Messianu DDB, Miami. — Clamato.

Y&R Advertising, New York. John O'Brien, mg ptrn. — 7 Up, dnL, Dr Pepper, Schweppes, 7 Up, Sunkist, Canada Dry.

Mediaedge:cia Worldwide, New York. Cathy Goodin, mg ptrn. — media svcs, Dr Pepper, 7 Up.

Cadbury Adams: 400 Interpace Pkwy., Building B, Parsippany, N.J. 07054/Phone: (973) 385-0187. Brad Irwin, pres; Philip Dobbs, VP-mktg.

Deutsch, New York. Val DiFebo, mg ptrn & gm. — Bassett's Licorice, Hawaiian Punch Soft & Chewy Candy, Sour Patch Kids, Swedish Fish.

J. Walter Thompson Co., New York. Peter Grossman, global bus dir. — Bubbalo, Bubblicious, Chiclets, Chiclets Ice, Dentyne gum, Halls, Halls Fruit Breezers, Halls VitaC, Trident gum.

82 Campbell Soup Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$54,080	\$78,202	-30.8
Sunday magazine	7,714	10,606	-27.3
Newspaper	940	1,465	-35.8
National newspaper	282	707	-60.1
Outdoor	1,241	601	106.6
Network TV	107,540	128,000	-16.0
Spot TV	27,133	18,949	43.2
Syndicated TV	22,531	11,108	102.8
Cable TV networks	55,608	48,755	14.1
Network radio	6,213	9,796	-36.6
National spot radio	374	1,001	-62.6
Internet	9,960	6,510	53.0
Spanish-language TV	467	3,023	-84.5
Business publications	1,102	1,664	-33.8
Local magazines	47	48	-2.3
Measured media	295,233	320,435	-7.9
Unmeasured media	117,057	127,049	-7.9
Total	412,290	447,484	-7.9
By brand	2003	2002	% chg
Campbell's soup & pkgd foods	127,855	175,887	-27.3
Pepperidge Farm snacks	64,139	64,314	-0.3
V8 vegetable drink	43,013	31,790	35.3
Pace salsa	25,694	13,530	89.9
Prego spaghetti sauce	23,320	21,742	7.3

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$6,678	\$6,133	8.9
Earnings	595	525	13.3
U.S.	2003	2002	% chg
Sales	4,549	4,339	4.8
Earnings bef. interest & taxes ...	965	913	5.7
Division sales	2003	2002	% chg
N. Amer. Soup, Away from Home ..	2,606	2,524	3.2
Biscuits & Confectionary	1,774	1,507	17.7
NA Sauces & Beverages	1,246	1,182	5.4
International Soup & Sauces ...	1,052	920	14.3

Headquarters

Campbell Soup Co./World Headquarters, Campbell Place, Camden, N.J. 08103-1799/Phone: (856) 342-4800.

Personnel, brands, agencies

Corporate: Douglas R. Conant, pres & CEO; Mark Sarvary, exec VP & pres-Campbell N. Amer.; M. Carl Johnson, sr VP-corp strategy, bus devel & sls tech; Denise Morrison, sr VP-sls & chief customer officer; David R. White, sr VP-global supply chain.

Godiva Chocolatier: 355 Lexington Ave., New York, N.Y. 10017/Phone: (212) 984-5900. Jim Goldman, pres-Godiva ww; Eugene Dunkin, pres-Godiva N. Amer.; GERALYN R. Breig, pres-Godiva intl; Michael Simon, VP-N. Amer. mktg.

Margeotes Fertitta & Partners, New York. George Fertitta, pres; Liz Morrow, media dir. — Godiva candy.

Pepperidge Farm: 595 Westport Ave., Norwalk, Conn. 06851/Phone: (203) 846-7000. Jay Gould, pres; Patrick J. Callaghan, sr VP-bus devel & pres-frozen foods; Maureen Linder, bus dir-bakery mktg; Barbara Eden, dir-mktg svcs.

Y&R Advertising, New York. Shelley Diamond, exec VP & mg dir. — Pepperidge Farm snacks.

Mediaedge:cia Worldwide, New York. Charles Courtier, exec chmn-ww; Lee Doyle, mg ptrn & client svcs dir; Suzanne Kaufman, mg ptrn & acct dir. — media buying.

U.S. Soup, Sauces & Beverages: Campbell Place, Camden, N.J. 08103-1799/Phone: (856) 342-4800. Larry S. McWilliams, pres-U.S. Soups, Sauces & Beverages; Sean Connolly, VP & gm-soup & meal consumption; Lynn Ambrosia, VP & gm-sauces & meal preparation; Diane Teer, VP & gm-beverages.

Y&R Advertising, New York. Shelley Diamond, exec VP & mg dir. — Franco American foods, Pace sauces, Prego sauces, V8 beverages.

BBDO Worldwide, New York. Tom Sebok, exec VP & mg dir. — Campbell's condensed soups, new prods, Select soups, Soup at Hand, Swanson broth.

Mediaedge:cia Worldwide, New York. Charles Courtier, exec chmn-ww; Lee Doyle, mg ptrn & client svcs dir; Suzanne Kaufman, mg ptrn & acct dir. — media buying.

100 Canon**U.S. ad spending (\$ in thousands)**

By media	2003	2002	% chg
Magazine	\$74,198	\$46,695	58.9
Sunday magazine	130	NA	NA
Newspaper	6,480	3,652	77.5
National newspaper	8,617	11,700	-26.3

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Outdoor	552	232	137.8
Network TV	26,686	14,585	83.0
Spot TV	20,826	17,472	19.2
Cable TV networks	7,771	7,065	10.0
Network radio	250	4	NA
National spot radio	4,071	389	946.0
Internet	1,126	1,340	-16.0
Business publications	14,243	11,380	25.2
Measured media	164,950	114,513	44.0
Unmeasured media	152,262	105,704	44.0
Total	317,212	220,218	44.0
By brand	2003	2002	% chg
Canon cameras & office equip. ...	164,950	114,513	44.0

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$27,363	\$23,356	17.2
Earnings	2,362	1,515	55.9
Americas	2003	2002	% chg
Sales	8,953	8,025	11.6
Division sales	2003	2002	% chg
Business machines	19,479	17,690	10.1
Cameras	5,598	3,859	45.1
Optical & other prods	3,532	2,921	20.9

Headquarters

Canon/30-2 Shimomaruko 3-chome, Ohta-ku, Tokyo, Japan 146-8501/Phone: (81)3-3758-2111.

Canon/One Canon Plaza, Lake Success, N.Y. 11042/Phone: (516) 328-5000.

Personnel, brands, agencies

Corporate: Fujio Mitarai, pres & CEO; Kunio Watanabe, mg dir-grp exec, corp strategy & devel.

Canon USA: One Canon Plaza, Lake Success, N.Y. 11042/Phone: (516) 328-5000. Kinya Uchida, pres & CEO; Debra Epstein, VP & gm-corp comms.

Grey Worldwide, New York. Ken Levy, exec VP. — media plng, online adv, Hispanic adv, 35mm cameras, compact point & shoot cameras, EF lenses, IS binoculars.

DCA Advertising, New York. Dan McNally, sr VP-grp acct dir; Max Terry, VP-mgmt super; Ron Barry, VP-mgmt super. — media svcs, online adv, Inkjet printers, digital cameras, mini DV camcorders, card photo printers, copiers, printers, scanners, facsimiles, MFPs, software.

Starcom, Chicago. Chris Boothe, sr VP-Canon AOR media dir. — media buying.

44 Cendant Corp.**U.S. ad spending (\$ in thousands)**

By media	2003	2002	% chg
Magazine	\$15,992	\$8,831	81.1
Sunday magazine	314	72	337.4
Newspaper	33,936	28,519	19.0
National newspaper	6,840	7,385	-7.4
Outdoor	25,425	25,665	-0.9
Network TV	28,410	25,362	12.0
Spot TV	9,251	10,381	-10.9

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Syndicated TV	17,565	5,119	243.1
Cable TV networks	45,331	56,242	-19.4
Network radio	2,026	3,007	-32.6
National spot radio	3,688	2,948	25.1
Internet	8,179	8,540	-4.2
Yellow Pages	27,196	27,663	-1.7
Spanish-language TV	3,994	1,400	185.2
Business publications	3,127	6,339	-50.7
Local magazines	394	349	13.1
Measured media	231,667	217,823	6.4
Unmeasured media	541,391	509,037	6.4
Total	773,058	726,860	6.4
By brand	2003	2002	% chg
Century 21 realty	42,423	23,935	77.2
Budget Rent-A-Car	30,739	24,378	26.1
Avis Rent-A-Car	22,464	29,533	-23.9
Coldwell Banker realty	21,477	20,322	5.7
Cheap Tickets online travel	17,949	18,143	-1.1
Jackson Hewitt tax services	12,911	12,123	6.5
Days Inn hotels	10,930	11,663	-6.3
Super 8 motels	10,293	7,599	35.4

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$18,192	\$14,187	28.2
Earnings	1,172	846	38.5
U.S.	2003	2002	% chg
Sales	15,997	12,256	30.5
Domestic pre-tax income	1,810	1,234	46.7
Division sales	2003	2002	% chg
Real estate svcs	6,720	4,687	43.4
Vehicle svcs	5,851	4,175	40.1
Hospitality svcs	2,523	2,180	15.7
Travel distribution svcs	1,659	1,695	-2.1
Financial svcs	1,401	1,325	5.7

Headquarters

Cendant Corp./9 W. 57th St., New York, N.Y. 10019/Phone: (212) 413-1800.

Notes

Cendant Corp. acquired Budget Rent-A-Car out of bankruptcy for \$109 million and the assumption of \$2.4 billion debt in Nov. 2002.

Personnel, brands, agencies

Corporate: Henry R. Silverman, chmn, pres & CEO; Stephen P. Holmes, vice chmn & chmn & CEO-hospitality svcs div; Kevin M. Sheehan, chmn & CEO-vehicle svcs div; Samuel L. Katz, chmn & CEO-travel distribution svcs div & co-chmn financial svcs; Richard A. Smith, chmn & CEO, real estate svcs div.

AmeriHost Franchise Systems: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 428-9700. Keith Pierce, pres & CEO; Daniel Del Olmo, dir-mktg.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Avis Rent a Car System: 6 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 496-3500. F. Robert Salerno, pres & CEO; Scott Deaver, exec VP-mktg.

McCann Erickson Worldwide, New York. Kevin Scher, sr VP & grp mg dir. — Avis Rent-A-Car.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Impax Marketing Group, Philadelphia. Lisa Palmarini, VP. — sls promo.

Budget Rent A Car System: 6 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 496-3500. F. Robert Salerno, pres & CEO; Scott Deaver, exec VP-mktg.

McCann Erickson Worldwide, New York. Kevin Scher, sr VP & grp mg dir. — Budget Rent-A-Car.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Century 21 Real Estate Corp.: 1 Campus Dr., Parsippany, N.J. 07054/Phone: (973) 428-9700. Van Davis, pres & CEO; John Greenleaf, sr VP-mktg; Ken Toumey, VP-brand mgmt.

Lowe & Partners Worldwide, New York. Todd Stanley, exec VP & mg dir. — Century 21 realty.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Blue Dingo, New York. Joe Beatrice, CEO. — interactive mktg.

Octagon Worldwide, New York. Woody Thompson, VP-consultancy. — sports & event mktg.

Vidal Partnership, New York. Manny Vidal, ptnr. — Hispanic adv, Hispanic mktg & comms.

Weber Shandwick, New York. Rene Mack, pres/gm, Cons Lifestyle Grp. — PR.

Cheap Tickets: 7 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 496-0900. Evans Gebhardt, pres, Cendant's Retail Travel Svcs Div.

Grey E Marketing, New York. Adam Komack, sr VP & grp acct dir. — Cheap Tickets online travel brokerage.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Coldwell Banker: 1 Campus Dr., Parsippany, N.J. 07054/Phone: (973) 428-9700. Alex Perriello, pres & CEO; Regina Taylor, sr VP-mktg; Barbara Salerno, VP-adv & special markets; Monica Stickel, VP-affiliate mktg; Jennifer Smith, VP-strategic bus devel.

Kaplan Thaler Group, New York. Robin Koval, chief mktg officer & gm. — Coldwell Banker realty.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Bootstrap Software, New York. Jay Erickson, CEO. — interactive mktg.

Kinesis, New York. Andreas Panayi, CEO. — interactive mktg.

Days Inns Worldwide: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 428-9700. Joe Kane, pres; Chris Trick, VP-mktg.

Decker, Glastonbury, Conn. Andrew Maguire, pres. — Days Inn hotels.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

ERA Real Estate: 1 Campus Dr., Parsippany, N.J. 07054/Phone: (973) 428-9700. Brenda W. Casserly, pres & chief operating officer; P.J. Martin Smith, sr VP-mktg; Lynne Roth, dir-adv & direct mktg.

Christy MacDougall Mitchell Bodden, New York. Steve Bennett, acct mgr. — ERA realty.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Fairfield Resorts: 8669 Commodity Circle, Orlando, Fla. 32819/Phone: (407) 370-5200. Franz S. Hanning, pres & CEO; Bryant Raper, sr VP-mktg.

No agency.

Howard Johnson: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 428-9700. Ken Greene, pres; Keri Putera, dir-mktg.

Bezos/Nathanson Marketing Group, New York. David Nathanson, ptnr & chief creative officer; Mark Bezos, ptnr & CEO. — Howard Johnson hotels.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Jackson Hewitt: 7 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 496-1040. Michael Lister, pres & chief operating officer; Peter Tahinos, sr VP-mktg.

DeVito/Verdi, New York. Ellis Verdi, pres. — Jackson Hewitt tax svcs.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Grafica Group, Chester, N.J. John Flores, VP-interactive. — online media.

Knights Franchise Systems: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 428-9700. Rajiv Bhatia, pres; Rosanne Zusman, sr dir-mktg.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Lodging.com: 455 N. Federal Hwy., ste. O, Boca Raton, Fla. 33487/Phone: (888) 563-4464. Fred Bean, VP-sls.

No agency.

Ramada Franchise Systems: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 496-9700. Paul Hanley, pres; Faith Taylor, dir-mktg.

Bezos/Nathanson Marketing Group, New York. David Nathanson, ptnr & chief creative officer; Mark Bezos, founding ptnr. — Ramada hotels.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Super 8 Motels: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 496-8441. John Valletta, pres; Rosanne Zusman, sr dir-mktg.

Work, Richmond, Va. Don Just, CEO. — Super 8 motels.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Travelodge: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 428-9700. Nancy Poor, pres; Andy Maguire, sr dir-mktg.

Bezos/Nathanson Marketing Group, New York. David Nathanson, ptnr & chief creative officer; Mark Bezos, ptnr & CEO.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Villager Lodge Franchise Systems: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 428-9700. Rajiv Bhatia, pres; Rosanne Zusman, sr dir-mktg.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Wingate Inns International: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 428-9700. Keith Pierce, pres & CEO; Daniel Del Omo, dir-mktg.

Work, Richmond, Va. Don Just, CEO. — Wingate Inn.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

80 Citigroup

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$75,837	\$40,859	85.6
Sunday magazine	6,032	4,333	39.2
Newspaper	25,988	15,624	66.3
National newspaper	9,295	5,925	56.9
Outdoor	9,429	9,720	-3.0
Network TV	44,719	5,788	672.7
Spot TV	17,663	913	NA
Syndicated TV	5,902	NA	NA
Cable TV networks	24,688	7,005	252.5
Network radio	NA	14	NA
National spot radio	6,284	6,520	-3.6
Internet	32,344	27,608	17.2
Business publications	3,396	1,519	123.5
Local magazines	22	253	-91.2
Measured media	261,596	126,079	107.5
Unmeasured media	158,641	76,459	107.5
Total	420,237	202,539	107.5
By brand	2003	2002	% chg
Citi financial services	233,564	104,372	123.8
Salomon Smith Barney fin svcs ..	21,284	6,610	222.0

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$77,442	\$71,308	8.6
Earnings	17,853	15,276	16.9
Division sales	2003	2002	% chg
Global Consumer	41,195	37,964	8.5
Global Corp./Invest. Bank	20,040	19,143	4.7
Global Investment Mgmt.	8,685	7,621	14.0
Smith Barney	5,827	5,830	-0.1
Proprietary Investments	1,008	-35	NA
Corporate	687	785	-12.5

Headquarters

Citigroup/399 Park Ave., New York, N.Y. 10043/Phone: (212) 559-1000.

Personnel, brands, agencies

Corporate: Sanford I. Weill, chmn; Charles Prince, CEO; Brad Jakeman, dir-global adv.

Merkley & Partners, New York. Lou Killeffer, chief mktg officer.

Global Consumer Group: 399 Park Ave., New York, N.Y. 10022/Phone: (212) 559-1000. Marjorie Magner, chmn & CEO; Anne MacDonald, global mktg.

Merkley & Partners, New York. Diane Epstein, gr acct dir. — Women & Co.

Wunderman, New York. Francesca Carter, sr VP & gr acct dir. — direct mktg, Citicards.

Smith Barney: 388 Greenwich St. 38th fl., New York, N.Y. 10043/Phone: (212) 816-6000. Sallie Krawcheck, CEO.

Merkley & Partners, New York. Diane Epstein, gr acct dir. — Smith Barney.

60 Clorox Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$178,874	\$135,396	32.1
Sunday magazine	11,502	14,698	-21.7
Newspaper	706	62	NA
National newspaper	15	NA	NA
Outdoor	14	88	-84.4
Network TV	118,302	154,575	-23.5
Spot TV	21,927	32,712	-33.0
Syndicated TV	40,128	57,234	-29.9
Cable TV networks	82,401	85,318	-3.4
Network radio	1,978	4,510	-56.1
National spot radio	814	1,542	-47.2
Internet	605	1,587	-61.9
Spanish-language TV	30,499	16,260	87.6
Business publications	32	518	-93.9
Measured media	487,796	504,499	-3.3
Unmeasured media	65,596	67,842	-3.3
Total	553,392	572,341	-3.3

By brand	2003	2002	% chg
Clorox bleaches & cleaners	192,051	202,626	-5.2
Glad trash & storage bags	74,426	73,337	1.5
Hidden Valley salad dressings	42,310	39,964	5.9
Brita water filters	36,543	35,965	1.6
Pine-Sol cleaner	32,724	28,318	15.6
Armor All car protectant	21,474	15,479	38.7
Liquid Plummer drain cleaner	16,097	22,149	-27.3
Tilex cleaners	16,062	17,531	-8.4
Fresh Step cat litter	14,778	19,690	-24.9
Formula 409	12,147	15,627	-22.3
K.C. Masterpiece BBQ sauces	10,018	9,491	5.6

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$4,144	\$4,022	3.0
Earnings	493	322	53.1

U.S.	2003	2002	% chg
Sales	3,540	3,349	5.7
Earnings (cont opers)	802	561	43.0

Division sales	2003	2002	% chg
Household prods-N. Amer.	2,282	2,198	3.8
Specialty prods	1,369	1,304	5.0
HH prods-Latin Amer./other	493	520	-5.2

Headquarters

Clorox Co./1221 Broadway, Oakland, Calif. 94612/Phone: (510) 271-7000.

Personnel, brands, agencies

Corporate: Robert Matschullat, chmn; Jerry Johnston, pres & CEO; Larry Peiros, grp VP; Derek Gordon, VP-mktg; Scott Weiss, VP & gm-Brita & Canada; Glenn Savage, VP & gm-laundry & homecare; Beth Springer, VP & gm-Glad prods; Tarang Amin, VP-mktg home care; Dan Dahlgren, VP & category mgr-auto care; Thomas Britanik, VP-mktg, specialty prods; Anthony Gerst, VP-brand mktg; Doug Milliken, VP-brand devel.

DDB Worldwide Communications, San Francisco. Mary Moudry, pres. — Armor All car protectant, Brita water filters, Clorox bleaches & cleaners, Formula 409, Fresh Step cat litter, Glad trash & storage bags, Hidden Valley salad dressings, K.C. Masterpiece BBQ Sauces, Pine-Sol cleaner, Tilex cleaner.

OMD Worldwide, San Francisco. Laura Bracken, dir (SF); Stacey Larson, dir (NY). — media buying.

Dieste, Harmel & Partners, Dallas. Larissa Acosta, mg ptrn. — Hispanic adv, Brita water filters, Clorox disinfectant wipes, Clorox liquid bleach, Glad trash bags, Kingsford charcoal, Pine-Sol.

69 Coca-Cola Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$23,372	\$37,611	-37.9
Sunday magazine	629	971	-35.1
Newspaper	1,478	2,525	-41.5
National newspaper	564	957	-41.1
Outdoor	7,318	10,034	-27.1
Network TV	141,243	155,745	-9.3
Spot TV	21,151	43,320	-51.2
Syndicated TV	6,514	8,682	-25.0
Cable TV networks	55,397	38,811	42.7
Network radio	2,927	2,725	7.4
National spot radio	1,418	601	135.9
Internet	3,935	3,419	15.1
Spanish-language TV	20,849	40,143	-48.1
Business publications	2,035	2,118	-3.9
Local magazines	23	14	65.9
Measured media	288,854	347,675	-16.9
Unmeasured media	183,869	221,312	-16.9
Total	472,723	568,987	-16.9

By brand	2003	2002	% chg
Coke & Diet Coke soft drinks	167,572	191,800	-12.6
Sprite soft drinks	31,835	45,253	-29.7
Minute Maid fruit drinks	21,114	27,178	-22.3
Dasani bottled water	18,837	20,847	-9.6
Nestea iced tea	15,588	18,631	-16.3
Simply Orange	14,367	4,909	192.7
Powerade sports beverage	10,131	11,932	-15.1

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$21,044	\$19,564	7.6
Earnings	4,347	3,050	42.5

North America	2003	2002	% chg
Sales	6,344	6,264	1.3
Operating income	1,198	1,494	-19.8

Headquarters

Coca-Cola Co./1 Coca-Cola Plaza, Atlanta, Ga. 30313/Phone: (404) 676-2121.

Notes

E. Neville Isdell becomes Coca-Cola Cos.' new chairman & CEO this summer when Douglas N. Daft, current chairman and CEO, retires. Mr. Isdell had spent 35 years with Coca-Cola before resigning in 2001 when he was CEO of Coca-Cola Beverages in the U.K. His appointment to the top post is believed to have precipitated the departure of Steven Heyer, president and chief operating officer. Mr. Heyer, heir-apparent to the top post before Mr. Isdell entered the picture, will leave the company this summer.

Personnel, brands, agencies

Corporate: Douglas N. Daft, chmn & CEO; E. Neville Isdell, chmn & CEO-elect; Chuck Fruit, chief mktg officer.

Coca-Cola North America: 1 Coca-Cola Plaza, Atlanta, Ga. 30313/Phone: (404) 676-2121. Donald Knauss, pres; Javier Benito, chief mktg officer-Coca Cola N. Amer.

Berlin Cameron/Red Cell, New York. Ewen Cameron, CEO. — C2, Coca-Cola Classic, COOL from Nestea, Dasani water, Mello Yello, Pibb Xtra.

Campbell Mithun, Minneapolis. Donna Wiederkehr, mgmt super. — Citra, Fresca, new prod devel.

Doner, Southfield, Mich. Heidi Riggs, acct svc super. — Simply Orange.

Foote, Cone & Belding Worldwide, New York & Chicago. Jeff Tarakajian, dir-global clients & new bus. — Dannon Springs, Diet Coke, Diet Coke with Lime.

Martin Agency, Richmond, Va. Monica Valenti, acct super. — Vanilla Coke.

Ogilvy & Mather Worldwide, New York. Scott Flood, sr ptrn & ww mg dir. — Fanta, Sprite.

Wieden & Kennedy, Portland, Ore. John Russell, acct dir. — KMX, PowerAde.

Starcom MediaVest, New York. Nancy Mullahy, exec dir. — media svcs.

Agencies assigned on a project basis. — regional agencies, Barq's.

Burrell Communications Group, Chicago. McGhee Williams, mg dir. — African-American adv, Coke.

Fitzgerald & Co., Atlanta. Lisa Galanti, mg dir; Russ Leblanc, VP & mgmt super. — N. Amer. regional adv.

Lapiz Integrated Hispanic Marketing, Chicago. Delores Kunda, pres & CEO. — Hispanic adv.

Coca-Cola North America Juices, Teas & Emerging Brands:

2000 St. James Place, Houston, Texas 77056/Phone: (713) 888-5000. Mike Saint John, sr VP & gm; Bradley Goist, sr VP; Charles Torrey, grp dir-Minute Maid/refrigerated; Rick Zuroweste, grp dir-kids; Laura Lopez, VP-bottler juice brand team; Steve McCormick, gm & chief operating officer-Odwalla.

Doner, Southfield, Mich. Monica Tysell, exec VP & acct mgmt dir. — Minute Maid.

Geppetto Group, New York. Jennifer Goodman, mg dir. — Hi-C.

Starcom MediaVest, New York. Nancy Mullahy, exec dir. — media svcs.

97 Colgate-Palmolive Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$21,870	\$16,644	31.4
Newspaper	424	99	330.0
Outdoor	53	64	-18.2
Network TV	44,467	50,350	-11.7
Spot TV	2,680	4,949	-45.8
Syndicated TV	8,125	5,164	57.3
Cable TV networks	13,407	19,938	-32.8
National spot radio	85	319	-73.4
Internet	2,498	249	902.2
Spanish-language TV	16,841	14,092	19.5
Business publications	402	645	-37.7
Measured media	110,851	112,514	-1.5
Unmeasured media	220,829	224,140	-1.5
Total	331,681	336,654	-1.5
By brand	2003	2002	% chg
Colgate toothpaste/dental prods ..	82,930	80,563	2.9

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$9,903	\$9,294	6.6
Earnings	1,421	1,288	10.3
North America	2003	2002	% chg
Sales	2,356	2,374	-0.8
Operating profit	547	579	-5.5
Division sales	2003	2002	% chg
Total pet nutrition	1,316	1,187	10.9
Oral, personal & healthcare ...	8,587	8,107	5.9

Headquarters

Colgate-Palmolive Co./300 Park Ave., New York, N.Y. 10022-7499/Phone: (212) 310-2000.

Notes

Colgate-Palmolive in October 2003 agreed to sell to Procter & Gamble its European laundry detergent brands Axiom in France, Dynamo in Denmark, Dinamo in Italy, Ajax in Sweden and Gama in France. Colgate is concentrating on its oral and personal care businesses.

Personnel, brands, agencies

Corporate: Reuben Mark, chmn & CEO; William S. Shanahan, pres; Lois Juliber, chief operating officer; Javier Teruel, exec VP; Ian Cook, exec VP.

Colgate U.S.: 300 Park Ave., New York, N.Y. 10022-7499/Phone: (212) 310-2000. Seamus McBride, pres; Peter Chase, VP-mktg; Jim Napolitano, VP-sls; Suzan Harrison, VP & gm-oral care; Peter Ryan, VP & gm-home care; John Kooyman, gm-personal care; Bill Kashimer, dir-U.S. media; John Simone, dir-mktg comms svcs.

Y&R Advertising, New York. Gord McLean, mg ptrn; Steve Forcione, mg ptrn. — Ajax, Colgate toothpastes, Colgate toothbrushes, Fabuloso, Irish Spring, Lady Speed Stick, Mennen Speed Stick, Murphy Oil Soap, Palmolive dish soap, Softsoap.

Siboney USA, New York. Jose M. Cubaz, chmn; Carla Mercado Trum, gm; Alexandra Zanic, acct dir. — Hispanic adv.

UniWorld Group, New York. Byron Lewis, chmn & CEO; Ken Gilbert, pres; Regina Washington, grp acct dir. — African-American adv.

Hill's Pet Nutrition: 400 SW Eighth St., Topeka, Kan. 66603/Phone: (785) 354-8523. Robert C. Wheeler, CEO; Steve Marton, pres & chief operating officer; Joy Klemencic, VP-global bus devel & strat plng; Randy Partee, VP-mktg; John Munchoff, dir-cons mktg; Karen Padgett, dir-veterinary bus channel; Michele Kaminski, dir-new prods mktg.

Y&R Advertising, New York. John Morris, sr ptrn. — Hill's Science Diet.

45 ConAgra Foods

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$59,436	\$30,116	97.4
Sunday magazine	5,363	1,262	324.9
Newspaper	735	159	361.9
National newspaper	29	381	-92.3
Outdoor	248	640	-61.3
Network TV	51,316	65,524	-21.7
Spot TV	11,043	9,986	10.6
Syndicated TV	19,265	21,818	-11.7

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Cable TV networks	28,385	23,252	22.1
Network radio	3,715	25	NA
National spot radio	4,324	9,366	-53.8
Internet	1,863	972	91.7
Spanish-language TV	500	1,196	-58.2
Business publications	3,047	3,604	-15.5
Local magazines	12	24	-49.8
Measured media	189,278	168,324	12.4
Unmeasured media	575,526	511,810	12.4
Total	764,804	680,133	12.4
By brand	2003	2002	% chg
Healthy Choice frozen foods	30,507	34,894	-12.6
Orville Redenbacher popcorn	20,431	15,305	33.5
Hunt's ketchup	16,891	9,302	81.6
Chef Boyardee pasta	16,796	17,075	-1.6
Marie Callender's frozen foods	10,983	11,405	-3.7
Egg Beaters egg substitute	10,592	7,526	40.7
Homestyle Bakes pkgd meals	10,151	12,232	-17.0

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$19,839	\$25,473	-22.1
Earnings	775	783	-1.0
U.S.	2003	2002	% chg
Sales	17,739	23,330	-24.0
U.S. income before taxes	1,151	1,074	7.2
Division sales	2003	2002	% chg
Packaged foods	12,297	12,528	-1.8
Agricultural products	2,916	3,223	-9.5
Meat processing	2,653	8,390	-68.4
Food ingredients	2,394	2,229	7.4

Headquarters

ConAgra Foods/1 ConAgra Dr., Omaha, Neb. 68102/Phone: (402) 595-4000.

Notes

ConAgra sold 55% of its fresh beef and pork operations to a joint venture led by Hicks, Muse, Tate & Furst in September 2002. On an accounting basis, this meant only four months in revenue from these operations were included in its fiscal year ended in May 2003. As a result of the divestiture, ConAgra had pro forma revenue for its fiscal years ended in May 2003 versus May 2002 of \$173.8 billion vs. \$177.4 billion. In November 2003, ConAgra sold its poultry business for \$546.8 million to Pilgrim's Pride.

Personnel, brands, agencies

Corporate: Bruce Rohde, chmn & CEO; Dennis O'Briend, pres & chief operating officer, ConAgra Foods retail prods; Roger Berdusco, sr VP-mktg.

ConAgra Foods Frozen Foods Group: 5 ConAgra Dr., Omaha, Neb. 68102/Phone: (402) 595-6000. R. Dean Hollis, pres & chief operating officer.

DDB Worldwide Communications, San Francisco. — Banquet frozen foods.

Grey Worldwide, New York. Ken Dowling, exec VP & acct mgr. — Marie Callender's frozen foods.

Leo Burnett Worldwide, Chicago. Chris Lindblad, sr VP & acct dir. — Healthy Choice frozen foods.

Wonder Group, Cincinnati. Tim Coffey, chmn & CEO. — Kid's Cuisine frozen dinners.

ConAgra Foods Grocery Foods Group: 3353 Michelson Dr., Irvine, Calif. 92612/Phone: (949) 437-1000. R. Dean Hollis, interim pres & chief operating officer.

Fogarty Klein Monroe, Dallas. Rich Klein, principal & co-CEO. — Homestyle Bakes, Hunt's canned tomatoes, Hunt's ketchup, Manwich, Pam cooking spray, Ro*Tel canned tomatoes, Wolf Brand.

DDB Worldwide Communications, San Francisco. Mary Moudry, pres. — Banquet Dessert Bakes, Banquet Homestyle Bakes, Hunt's snack pack, Swiss Miss cocoa.

Leo Burnett Worldwide, Chicago. Chris Lindblad, sr VP & acct dir. — Chef Boyardee pasta.

ConAgra Foods Snack Foods Group: 7700 France Ave. South, Edina, Minn. 55435/Phone: (952) 835-6900. Paul Lapadat, pres & chief operating officer.

Fallon Worldwide, Minneapolis. Mike Buchner, gm. — Act II, David, Orville Redenbacher popcorn, Pemmican, Slim Jim.

ConAgra Refrigerated Foods Group: 2001 Butterfield Rd., Downers Grove, Ill. 60515/Phone: (630) 512-1000. Richard Scalise, pres & chief operating officer.

Cramer-Krasselt, Chicago. Tim Denison, sr VP-acct mgmt. — Cook's Ham.

Grey Worldwide, New York. Ken Dowling, exec VP & acct mgr. — Armour, Blue Bonnet, Butterball, Eckrich, Egg Beaters, Fleischmann's, Hebrew National, Louis Kemp, Parkay, Reddiwip.

Leo Burnett Worldwide, Chicago. Chris Lindblad, sr VP & acct dir. — Healthy Choice.

MediaCom, New York. Evelyn Laug, AMD/grp dir. — media buying.

95 Adolph Coors Co.**U.S. ad spending (\$ in thousands)**

By media	2003	2002	% chg
Magazine	\$3,730	\$1,617	130.6
Sunday magazine	.68	32	113.8
Newspaper	1,190	1,430	-16.7
National newspaper	1,060	452	134.6
Outdoor	8,751	10,080	-13.2
Network TV	92,685	134,539	-31.1
Spot TV	32,263	30,223	6.7
Syndicated TV	.9	NA	NA
Cable TV networks	25,186	19,570	28.7
Network radio	139	NA	NA
National spot radio	2,767	2,085	32.7
Internet	923	20	NA
Spanish-language TV	18	9,134	-99.8
Business publications	203	88	131.8
Local magazines	16	11	52.4
Measured media	169,008	209,279	-19.2
Unmeasured media	170,446	211,060	-19.2
Total	339,454	420,339	-19.2
By brand	2003	2002	% chg
Coors & Coors Light beer	151,629	182,659	-17.0

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$4,000	\$3,776	5.9
Earnings	175	162	8.0
Americas	2003	2002	% chg
Sales	2,410	2,401	0.4
Income before taxes	221	219	0.9

Headquarters

Adolph Coors Co./311 Tenth St., Golden, Colo. 80401/Phone: (303) 279-6565.

Notes

Coors acquired Bass Holdings in February 2002 from Interbrew that included assets of beer brands Carling, Worthington and Caffrey's (but not Bass, Tennents among several other brands) in England and Wales. In the acquisition, it obtained the U.K. and the Republic of Ireland distribution rights to Grolsch (via a joint venture in which Coors Brewers Ltd. has a 49% interest with Royal Grolsch N.V.). Brand rights for Carling, the largest acquired brand by volume, are mainly for Europe.

Personnel, brands, agencies

Corporate: William K. Coors, chmn-Adolph Coors Co.; Peter H. Coors, chmn-Coors Brewing Co.; W. Leo Kiely III, pres & CEO-Coors Brewing Co.

Coors Brewing Co.: 311 Tenth St., Golden, Colo. 80401/Phone: (303) 279-6565. Ron Askew, chief mktg officer; Carl Barnhill, chief revenue officer.

Foote, Cone & Belding Worldwide, Chicago. Dan Fox, exec VP & grp mg dir; Marty Stock, sr VP & mg dir. — Coors Original, Coors Light, Coors Edge, Keystone, Killians.

Deutsch, Los Angeles. Mike Sheldon, mg ptrn & gm. — Aspen Edge, Coors Light, Mexicali.

Initiative Media North America, New York. Ray Dundus, sr VP & grp acct dir. — natl TV media buying.

Bromley Communications, San Antonio. Marco Garsed, acct exec. — Hispanic adv.

Carol H. Williams Advertising, Oakland, Calif. Larry Hancock, acct exec. — African-American adv.

5 DaimlerChrysler

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$298,990	\$268,300	11.4
Sunday magazine	1,418	2,889	-50.9
Newspaper	239,674	120,177	99.4
National newspaper	25,188	20,915	20.4
Outdoor	14,623	10,560	38.5
Network TV	241,888	228,389	5.9
Spot TV	595,994	589,789	1.1
Syndicated TV	3,125	2,414	29.4
Cable TV networks	93,401	89,795	4.0
Network radio	2,002	10,080	-80.1
National spot radio	26,150	14,689	78.0
Internet	21,760	10,535	106.5
Yellow Pages	8,294	14,000	-40.8
Spanish-language TV	24,797	18,502	34.0
Business publications	10,317	8,683	18.8
Local magazines	615	248	147.8
Measured media	1,608,235	1,409,967	14.1
Unmeasured media	709,242	621,805	14.1
Total	2,317,477	2,031,772	14.1
By brand	2003	2002	% chg
Dodge vehicles	584,872	498,654	17.3
Chrysler vehicles	509,483	437,478	16.5
Jeep vehicles	334,327	284,805	17.4
Mercedes-Benz vehicles	145,037	135,654	6.9
DaimlerChrysler corporate	19,274	29,249	-34.1

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$155,719	\$140,034	11.2
Earnings	511	4,483	-88.6
U.S.	2003	2002	% chg
Sales	72,814	72,641	0.2
Division sales	2003	2002	% chg
Chrysler Group	56,291	56,744	-0.8
Mercedes Car Group	54,812	44,467	23.3
Commercial vehicles	30,712	25,566	20.1
Services	13,693	13,080	4.7
Other	211	177	19.2

Headquarters

DaimlerChrysler/225 Epplestrasse, 70546 Stuttgart, Germany /Phone: 49-711-17-0.

DaimlerChrysler/1000 Chrysler Dr., Auburn Hills, Mich. 48326-2766/Phone: (248) 576-5741.

Personnel, brands, agencies

Corporate: Juergen E. Schrempp, chmn; Dieter Zetsche, pres & CEO; Chrysler Group: Joe Eberhardt, exec VP-global sls, mktg & svcs; George Murphy, sr VP-global brand mktg; Gary Dilts, sr VP-slcs; Christine MacKenzie, VP-corp mkt rsch; Bonita Stewart, dir-interactive comms; David Rooney, dir-media opers & cross brand mktg; Jason Vines, VP-Chrysler/Jeep comms; Julie Roehm, dir-mktg comms.

BBDO Detroit, Troy, Mich. Joe Garcia, pres. — corporate, DaimlerChrysler svcs, fleet, Mopar parts.

PHD Detroit, Troy, Mich. Michael O'Malley, pres. — media svcs.

George P. Johnson Co., Auburn Hills, Mich. Robert G. Vallee, Jr., CEO. — event mktg.

GlobalHue, Southfield, Mich. Don Coleman, chmn & CEO; Melissa Killinger, sr VP & natl brand grp acct dir. — multicultural adv.

Chrysler Division: 1000 Chrysler Dr., CIMS 485-05-10, Auburn Hills, Mich. 48326-2766/Phone: (248) 512-6001. Jeffrey Bell, VP-Chrysler/Jeep mktg; Ann Fandozzi, dir-Chrysler mktg & family vehicle prod plng; John Sloan, dir-Chrysler car mktg & premium vehicle prod plng; Jay B. Kuhnle, dir-Chrysler/Jeep brand comms.

BBDO Detroit, Troy, Mich. Joe Garcia, pres. — Chrysler vehicles.

PHD Detroit, Troy, Mich. Beth Mayry, sr VP & dir-Chrysler. — media svcs.

GlobalHue, Southfield, Mich. Bryan Whigam, sr VP & brand acct dir. — multicultural adv.

Organic, Detroit. Chuck Russo, VP & mg dir. — interactive mktg.

Dodge Division: 1000 Chrysler Dr., CIMS 485-05-08, Auburn Hills, Mich. 48326-2766/Phone: (248) 512-2571. Darryl Jackson, VP-Dodge mktg; Joe Veltri, dir-Dodge truck mktg & prod plng; Craig Fisher, dir-commercial vehicle mktg & prod plng; Fred Diaz, dir-Dodge comms.

BBDO Detroit, Troy, Mich. Joe Garcia, pres. — Dodge vehicles.

PHD Detroit, Troy, Mich. Denise Smith, sr VP & dir-Dodge. — media svcs.

GlobalHue, Southfield, Mich. Dennis Castillo, sr VP & brand acct dir. — multicultural adv.

Organic, Detroit. Chuck Russo, VP & mg dir. — interactive mktg.

Jeep Division: 1000 Chrysler Dr., CIMS 485-0558, Auburn Hills, Mich. 48326-2766/Phone: 248-512-2297. Jeffrey Bell, VP-Chrysler/Jeep mktg; Michael Accavitti, dir-Jeep mktg & activity vehicle prod plng; Jay B. Kuhnle, dir-Chrysler/Jeep brand comms.

BBDO Detroit, Troy, Mich. Joe Garcia, pres. — Jeep vehicles.

PHD Detroit, Troy, Mich. Debbie Jones, sr VP & dir-Jeep. — media svcs.

GlobalHue, Southfield, Mich. Bryan Whigam, sr VP & brand acct dir. — multicultural adv.

Organic, Detroit. Chuck Russo, VP & mg dir. — interactive mktg.

Mercedes-Benz USA: One Mercedes Dr., Montvale, N.J. 07645/Phone: (201) 573-0600. Paul Halata, pres & CEO; Keith May, sr VP-sls opers; Michelle Cervantez, VP-mktg; David Schembri, VP-pre-owned & fleet opers.

Merkley & Partners, New York. Alex Gellert, CEO. — Mercedes-Benz vehicles.

BBDO Detroit, Troy, Mich. Joe Garcia, pres. — Mercedes-Benz parts & service.

PHD, New York. Lee Wilson, sr VP & dir-Mercedes-Benz. — media buying.

Critical Mass, Chicago. Michael Williams, acct dir. — interactive mktg.

58 Dell

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$42,946	\$41,929	2.4
Sunday magazine	76,781	71,406	7.5
Newspaper	48,757	44,449	9.7
National newspaper	34,765	32,609	6.6
Outdoor	636	554	14.9
Network TV	39,304	53,139	-26.0
Spot TV	6,782	6,912	-1.9
Syndicated TV	3,440	4,143	-17.0
Cable TV networks	129,031	104,984	22.9
Network radio	2,211	NA	NA
National spot radio	3,085	1,237	149.3
Internet	48,887	28,074	74.1
Business publications	30,268	32,658	-7.3
Measured media	466,892	422,094	10.6
Unmeasured media	97,928	88,532	10.6
Total	564,820	510,626	10.6
By brand	2003	2002	% chg
Dell computers	466,892	422,094	10.6

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$41,444	\$35,404	17.1
Earnings	2,645	2,122	24.6
Americas	2003	2002	% chg
Sales	28,603	25,047	14.2

Headquarters

Dell/1 Dell Way, Round Rock, Texas 78682-2222/Phone: (512) 338-4400.

Notes

Michael Dell steps down as CEO effective July 2004, remaining as chairman. Replacing him as CEO is current president Kevin Rollins, who becomes a member of the board.

Personnel, brands, agencies

Corporate: Michael S. Dell, chmn; Kevin B. Rollins, CEO; Michael A. George, chief mktg officer & VP-U.S. cons bus.

DDB Worldwide Communications, Chicago. Greg Taucher, ww acct dir; Robert Habeck, sr VP & grp media dir.

OMD Worldwide, Chicago. Robert Habeck, sr VP & grp media dir; Susan Morgenstein (New York), acct exec. — media svcs.

Fogarty Klein Monroe, Houston. Bill Fogarty, principal & founder; Steve Speier, exec VP & acct dir; Alycia Watts, VP & mgmt sup. — direct mktg, interactive mktg.

Tocquigny Advertising, Interactive & Marketing, Austin, Texas. Yvonne Tocquigny, pres; Valerie Hansladen, prin; Denise Waid, creative dir. — interactive mktg.

Matlock Advertising & Public Relations, Atlanta. Sandra Waite, acct lead.

63 Deutsche Telekom

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$10,235	\$9,619	6.4
Newspaper	136,297	158,639	-14.1
National newspaper	14,808	13,799	7.3
Outdoor	2,512	2,454	2.4
Network TV	98,103	60,941	61.0
Spot TV	24,439	67,780	-63.9
Syndicated TV	7,443	13,347	-44.2
Cable TV networks	39,750	15,687	153.4
National spot radio	8,991	7,449	20.7
Internet	8,098	2,768	192.5
Yellow Pages	5,172	5,037	2.7
Spanish-language TV	15,038	7,478	101.1
Business publications	563	488	15.5
Measured media	371,451	365,485	1.6
Unmeasured media	146,127	143,780	1.6
Total	517,578	509,265	1.6
By brand	2003	2002	% chg
T-Mobile wireless service ...	364,516	357,766	1.9

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$63,729	\$51,017	24.9
Earnings	1,852	-23,094	NA
U.S.	2003	2002	% chg
Sales	8,464	5,831	45.2

Headquarters

Deutsche Telekom/Friedrich-Ebert-Allee 140, Bonn, Germany 53113/Phone: 49-228-181-0.

Deutsche Telekom/280 Park Ave., 26th fl., New York, N.Y. 10017/Phone: (212) 424-2196.

Personnel, brands, agencies

Corporate: Kai Uwe Rieke, CEO.

T-Mobile: 12920 SE 38th St., Bellevue, Wash. 98006/Phone: (800) 218-9270. John Stanton, chmn; Robert Dotson, pres & CEO; John Clelland, sr VP-mktg; Jim Goodwin, VP-integrated mktg.

Saatchi/Publicis in the West, Seattle. Scott Foreman, sr VP & grp mg dir. — T-Mobile telephone services.

Optimedia International U.S., New York. — media svcs.

47 Diageo

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$78,962	\$78,039	1.2
Sunday magazine	200	604	-66.8
Newspaper	1,908	2,225	-14.2
National newspaper	679	460	47.5
Outdoor	20,461	23,274	-12.1
Network TV	29,351	46,669	-37.1
Spot TV	9,134	13,711	-33.4
Syndicated TV	4,075	3,495	16.6
Cable TV networks	42,250	31,749	33.1
Network radio	426	NA	NA
National spot radio	9,374	11,064	-15.3
Internet	5,241	4,106	27.7
Spanish-language TV	2,263	2,896	-21.9
Business publications	916	537	70.7
Local magazines	796	868	-8.3
Measured media	206,034	219,695	-6.2
Unmeasured media	542,139	578,085	-6.2
Total	748,173	797,780	-6.2
By brand	2003	2002	% chg
Smirnoff vodka	53,737	64,802	-17.1
Crown Royal Canadian whiskey	27,271	26,144	4.3
Captain Morgan rum	22,265	31,387	-29.1
Guinness beer	17,605	15,909	10.7
Jose Cuervo tequila	14,207	13,609	4.4
Bailey's Irish cream liqueur	13,667	9,988	36.8
Tanqueray gin	10,396	11,220	-7.3

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$15,531	\$16,689	-6.9
Earnings	125	2,392	-94.8
North America	2003	2002	% chg
Sales	5,197	6,977	-25.5
Operating profit	1,288	1,266	1.7
Division sales	2003	2002	% chg
Premium drinks	14,742	12,876	14.5
Quick svc restaurants	789	1,820	-56.6

Headquarters

Diageo/8 Henrietta Place, London, U.K. WIM9AG/Phone: 44-171-927-5200.

Diageo/Six Landmark Square, Stamford, Conn., 06901/Phone: (203) 359-7100.

Notes

Diageo sold Burger King at the turn of 2003 to Texas Pacific Group, a U.S.-based private-equity firm.

Personnel, brands, agencies

Corporate: James Blyth, chmn; Paul Walsh, grp chief exec.

Guinness UDV North America: Six Landmark Sq., Stamford, Conn. 06901/Phone: (203) 359-7100. Ivan Menezes, pres & CEO; Mark Waller, exec VP-cons strategy & mktg.

Arnell Group, New York. Miles Kellam, acct dir. — Jose Cuervo.

Bartle Bogle Hegarty, New York. Sara Thompson, acct dir. — Bailey, Johnnie Walker.

BBDO Worldwide, New York. Peter Sherman, sr VP & acct dir.

— Guinness, Red Stripe, Harp, Smithwicks.

Bezos/Nathanson Marketing Group, New York. Mark Bezos, CEO; David Nathanson, chief creative. — Talisker.

Butler, Shine, Stern & Partners, Sausalito, Calif. Greg Stern, pres. — Beaulieu Vineyard, Sterling Vineyards, Barton & Guestier.

Carol H. Williams Advertising, Oakland, Calif. Patrick Buchanan, pres. — urban adv, Crown Royal.

Colangelo Synergy Marketing, Darien, Conn. Tom Lynch, VP-client svcs. — Smirnoff and beers.

Frankel, Chicago. David Ludington, VP-acct svcs. — Jose Cuervo.

GEM Group, Minneapolis. Keith McCracken, CEO. — event execution, Jose Cuervo.

Grey Worldwide, New York. Tim Nicholls, exec VP-dir global svcs. — Captain Morgan, Crown Royal Canadian Whiskey, Parrot Bay, Seagram 7, Tanqueray, VO Canadian Whiskey.

J. Walter Thompson Co., New York. Howard Portrate, global bus dir. — Smirnoff Ice, Smirnoff Ice Triple Black, Smirnoff Blue, Smirnoff Twisted, J&B.

Laird & Partners, New York. Trey Laird, pres & exec creative dir. — Ciroc.

Manhattan Marketing Ensemble, New York. Doug Campbell, acct exec. — Guinness Extra Stout.

US Concepts, New York. Bob Bernstein, exec VP. — on premise activation, All Brands.

MediaCom, New York. Jim Porcarelli, exec VP & chief mktg officer. — media svcs.

Atmosphere BBDO, New York. Andreas Combuechen, CEO & chief creative officer. — interactive mktg, Red Stripe Beer.

BFG Communications, Hilton Head, S.C. Kevin Meany, pres. — sls promo, Baileys, Captain Morgan.

Dieste, Harmel & Partners, Dallas. Victor Arroyo, dir-promo. — Hispanic adv, Jose Cuervo Especial, Jose Cuervo Tradicional.

Kang & Lee, New York. Cynthia Park, acct dir. — Korean adv, Crown Royal.

MASS, Miami. Stephen Valter, acct exec; Kai Zimmerman, acct exec. — Hispanic adv, Tanqueray.

Mass Transit Interactive, New York. Jason Heller, pres. — interactive mktg, Captain Morgan, Crown Royal Canadian Whiskey, VO Canadian Whiskey, Seagram7, Ciroc Vodka.

Spike DDB, New York. Dana Wade, pres. — multicultural adv, Tanqueray.

Upshot Marketing Group, Chicago. Ellen Slauslan, VP-acct svcs. — sls promo, Crown Royal, Seagram 7, VO, Bulleit Bourbon.

Vidal Partnership, New York. Manny Vidal, CEO; Roberto Ruiz, ptnr. — Hispanic adv, Johnnie Walker.

WING Latino Group, New York. Jackie Bird, pres. — Hispanic adv, Crown Royal, Smirnoff Ice.

Schiffelin & Somerset Co.: 2 Park Ave., New York, N.Y. 10016/Phone: (212) 251-8200. John Esposito, pres & CEO; Gene Robinson, exec VP-sls.

Colby & Partners, Los Angeles. Diane Dryer, sr VP & acct dir. — Domaine Chandon.

Kirshenbaum Bond Creative Network, New York. Scott Moore, VP & acct dir. — Hennessy.

Lipman Richmond Greene, New York. David Lipman, chmn.

O Group, New York. Jamie Rosen, acct super. — merchandising, Hennessy.

TracyLocke, Wilton, Conn. Laura Ballou, ptnr & client svcs dir. — Grand Marnier.

True Agency, New York. Claude Grunitzky, chmn. — Grand Marnier.

MediaCom, New York. Jim Porcarelli, exec VP & chief mktg officer. — media svcs.

Admerasia, New York. Rehana Dutta, VP-client svcs. — Asian-American adv.

LatinWorks Marketing, Austin, Texas. Manny Flores, CEO & mg ptr. — Hispanic adv, Hennessy.

7 Walt Disney Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$122,896	\$97,915	25.5
Sunday magazine	7,593	16,698	-54.5
Newspaper	256,247	204,545	25.3
National newspaper	56,712	46,143	22.9
Outdoor	28,467	33,768	-15.7
Network TV	409,736	345,829	18.5
Spot TV	153,836	146,324	5.1
Syndicated TV	56,037	50,633	10.7
Cable TV networks	168,339	130,013	29.5
Network radio	15,101	13,724	10.0
National spot radio	40,548	31,783	27.6
Internet	27,747	23,513	18.0
Spanish-language TV	20,373	17,942	13.5
Business publications	27,307	19,145	42.6
Local magazines	763	442	72.9
Measured media	1,391,702	1,178,416	18.1
Unmeasured media	737,579	624,541	18.1
Total	2,129,282	1,802,957	18.1
By brand	2003	2002	% chg
Buena Vista movies	451,095	421,198	7.1
Disney videos	289,905	207,122	40.0
Miramax movies	275,213	185,328	48.5
Disney entertnmt & resorts	189,592	194,747	-2.6
ABC television network	93,941	78,077	20.3
ESPN cable television	52,873	40,255	31.3

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$27,061	\$25,329	6.8
Earnings	1,267	1,236	2.5
North America	2003	2002	% chg
Sales	22,124	20,770	6.5
Operating income	2,113	1,739	21.5
Division sales	2003	2002	% chg
Media networks	10,941	9,733	12.4
Studio entertainment	7,364	6,691	10.1
Parks & resorts	6,412	6,465	-0.8
Consumer products	2,344	2,440	-3.9

Headquarters

Walt Disney Co./500 S. Buena Vista St., Burbank, Calif. 91521/Phone: (818) 560-1000.

Notes

Walt Disney Co., in snubbing efforts by Comcast Corp. to discuss merger possibilities following Comcast's unsolicited bid of \$48 billion to acquire the entertainment/media combine, led Comcast to withdraw its offer in April 2004.

Personnel, brands, agencies

Corporate: Michael D. Eisner, CEO; Robert A. Iger, pres & chief operating officer.

Leo Burnett Worldwide, Chicago. Jim Tracy, exec VP & acct dir. **Starcom**, Chicago. Kathy Ring, exec VP & chief mktg officer. — media svcs.

A&E Television Networks (joint venture of ABC, Hearst & NBC): 235 E. 45th St., New York, N.Y. 10017/Phone: (212) 210-1400. Abbe Raven, exec VP & gm; Artie Scheff, sr VP-mktg; Lori Peterzell, dir-adv.

TBWA Worldwide, New York. Nicole Minore, grp acct dir; Ritu Sharma, acct dir.

Horizon Media, New York. Ruby Gottlieb, sr VP, dir-plng affiliated media svcs; Greg Fein, acct super; Erica Hunter, sr VP & acct grp head; Eric Blankfein, VP & dir-media plng. — media svcs.

ABC: 77 W. 66th St., New York, N.Y. 10023/Phone: (212) 456-7777. Anne Sweeney, co-chmn Disney Media Networks & pres-ABC Television; Stephen McPherson, pres-ABC Primetime Entertainment; Alex Wallau, pres-ABC network ops & admin; Mike Benson, sr VP-mktg; Marla Provencio, sr VP-mktg; Mike Shaw, pres-sales & mktg; Dan Longest, sr VP-integrated mktg & promo; Valerie McMichael, VP-mktg & promo, ABC Daytime; Cynthia Vannoy, VP-adv & promo, ABC Sports; Alan Ives, VP & creative dir-adv & promo.

BLT & Associates, Los Angeles. Clive Baillie, pres & CEO; Andi Delott, acct dir. — print creative, ABC Entertainment.

DCODE, Mill Valley, Calif. Jonathan Paley, mg dir; Matt Steinwald, sr acct exec; J.P. Allas, acct exec. — ABC Sports.

J. Brown Agency, Stamford, Conn. Monica Siales, acct exec. — ABC News.

OMD Worldwide, Los Angeles. Susie Vye, acct exec. — ABC Entertainment (media svcs), ABC New (media buying).

ABC Cable Networks Group: 3800 W. Alameda, Burbank, Calif. 91505/Phone: (818) 569-7500. Anne Sweeney, co-chmn Disney Media Networks & pres-ABC Television; Rich Ross, pres-Disney Channel Worldwide; Paul Lee, pres-ABC Family; Jonathan Barzilai, sr VP & gm-ABC Kids, Toon Disney; Deborah Blackwell, sr VP & gm-SOAPnet; Eleo Hensleigh, exec VP-ww brand strategy; Adam Sanderson, sr VP-brand mktg; John Rood, VP-brand mktg; Matthew Palmer, sr VP mktg-Disney Channel; Sherri York, VP mktg-SOAPnet; Heidi Lobel, sr VP network sales-ABC Daytime & SOAPnet; Elizabeth Bohannon, VP mktg-Toon Disney & ABC Kids; Tricia Wilbur, sr VP-adv sales & promo; Laura Nathanson, exec VP-adv sales & promo-ABC Family; Kerry J. Hughes, VP-adv sales & promo-ABC Kids.

OMD Worldwide, Los Angeles. Susie Vye, acct exec. — media svcs, ABC Family Channel.

ABC Radio Networks: 13725 Montfort Dr, Dallas, Texas 75240/Phone: (972) 991-9200. Trague Keller, pres; Ken Mayer, VP-finance & intl ops; Kevin Miller, sr VP & chief mktg officer; Jennifer Puritan, sr VP-adv sales.

Publicis Dialog, New York. Rogan Carlesimo, VP & mgmt super. — ABC radio, ESPN radio.

In-house. — media svcs.

Buena Vista Television: 500 S. Buena Vista St., Burbank, Calif. 91521/Phone: (818) 560-1000. Sal Sardo, exec VP-mktg; Sandra Brewer, VP-affiliate relations & media; Blake Bryant, VP-creative svcs; Kim Harbin, VP-press & publicity; Jennie Born, VP-natl promo.

In-house. Jimmy Lee, VP-print adv.

Disney Consumer Products: 500 S. Buena Vista St., Burbank, Calif. 91521/Phone: (818) 560-1000. Andy Mooney, chmn ww; Deborah Dugan, pres-Disney Publishing ww; R. Russell Hampton, Jr., sr VP & gm-Baby Epstein Co.; Graham Hopper, sr VP & gm-Buena Vista Games; Jessica Dunne, sr VP-Global Toys; Harry Dolman, exec VP-Global Hardlines; Roger Wyett, exec VP-Global Softlines.

No agency.

ESPN: 77 W. 66th St., New York, NY 10023/Phone: (212) 456-7777. George Bodenheimer, pres; Lee Ann Daly, exec VP-mktg; Aaron Taylor, VP-mktg; Spence Kramer, dir-adv & prog mktg; Sharon Otterman, VP-media strategies; Heather Campbell, VP-synergy & brand mgmt.

Ground Zero, Los Angeles. Jim Smith, mg ptrn; Court Crandall, creative ptrn.

Wieden & Kennedy, New York. Rich Weinstein, acct dir; Ty Monague, co-creative dir; Todd Woodbury, co-creative dir.

Concept Group. Griffin Stenger, co-creative dir; Gregg Wasiak, co-creative dir.

Hyperion Publishing: 77 W. 66th St., 11th fl., New York, N.Y. 10023/Phone: (212) 456-7777. Bob Miller, pres; Ellen Archer, publisher; Jane Comins, dir-mktg; Jessica Goldman Wiener, asst dir-adv & promo; Children's Books: Deborah Dugan, pres; Ann Dieble, dir-mktg.

Spier NY/Lord Group, New York. Bethany Chamberlain, pres & CEO; Lori Hnatov, mgmt super; Karen Henry, sr acct exec. — Hyperion.

Lifetime Entertainment Services (Walt Disney & Hearst joint venture): 309 W. 49th St., New York, N.Y. 10019/Phone: (212) 424-7000. Carole Black, pres & CEO; Rick Haskins, exec VP & genl mgr; Lynn Picard, exec VP & genl mgr; Tom Hanft, sr VP-mktg, adv & promo; Gerry Logue, sr VP & exec creative dir; Catherine Moran, VP-mktg.

In-house.

Walt Disney Internet Group: 500 S. Buena Vista St., Burbank, Calif. 91521/Phone: (818) 623-3200. Steve Wadsworth, pres; Ken Goldstein, exec VP & gm-Disney Online; Lorie Horwitz, mktg mgr-Disney Online; Petrina McPhee, mktg dir-subscription prods; Maria McPherson, sr mgr-mktg & bus devel-Movies.com; Maureen Bergmueller, mktg dir-FamilyFun.com.

In-house.

Walt Disney Parks & Resorts: 1675 Buena Vista Dr., Lake Buena Vista, Fla. 32830/Phone: (407) 824-2222. Al Weiss, pres; Linda Warren, exec VP-mktg & brand mgmt, Walt Disney World Resort; Bryan Wittman, VP-project devel & special events-Disneyland.

Leo Burnett Worldwide, Chicago. Jim Tracy, exec VP & acct dir; Todd Cromheecke, VP & acct dir.

Walt Disney Studios: 500 S. Buena Vista St., Burbank, Calif. 91521/Phone: (818) 560-1000. Dick Cook, chmn; Buena Vista Motion Pictures Group: Nina Jacobson, pres; Buena Vista Pictures Marketing: Oren Aviv, pres; Brett Dicker, exec VP; Kristy Frudenberg, sr VP-media; John Sabel, sr VP-creative print svcs; Dennis Rice, sr VP-publicity; Buena Vista International: Mark Zoradi, pres; Nic Crawley, sr VP-mktg; Teri Meyer, sr VP-publicity; Ticole Richards, VP-mktg & Creative Film Svcs; Mari Gastineau, VP-mktg & Creative Film Svcs; Donald Evans, VP-

mktg & promo; Buena Vista Home Entertainment: Robert Chapek, pres; Patrick Fitzgerald, exec VP-sls & distribution; Kristy Frudenberg, sr VP-adv; Gordon Ho, sr VP-brand mktg; Dana Lombardo, sr VP-mktg rsch; Andy Siditsky, sr VP-ww mktg svcs & DVD prod; Lori MacPherson, VP-brand mktg; Jim Bowman, VP-rsch; Buena Vista Home Entertainment International: Mark Zoradi, pres; Dennis Maguire, pres; Chris Brown, VP-mktg; Joel Binder, VP-pr; Buena Vista Music Group: Bob Cavallo, CEO; Chris Montan, pres; David Agnew, exec VP & gm; Robert Marick, sr VP & gm-Hollywood Records; Abbey Knowitch, sr VP & gm-Hollywood Records; Randy Goodman, pres-Lyric Street Records; Buena Vista Theatrical Group: Thomas Schumacher, pres; Heather Eppele, VP-mktg & adv; Miramax: Harvey Weinstein, co-chmn; Bob Weinstein, co-chmn; Jason Cassidy, exec VP-mktg; Lori Sale, exec VP-ww promo; Walt Disney Feature Animation: David Stainton, pres; Fred Tio, exec VP.

Starcom, Chicago. Renetta McCann, CEO; Kathy Ring, exec VP & chief mktg officer. — media svcs.

Allied Advertising Agency, Boston. Gerald Feldman, pres. — media buying, Buena Vista Motion Pictures.

Moroch/Leo Burnett USA, Dallas. Thomas F. Moroch, chmn; Patrick Kempf, CEO. — media svcs, Buena Vista Motion Pictures, Miramax.

Nemer Fieger, Minneapolis. James Fieger, pres & CEO. — media buying, Buena Vista Motion Pictures.

Palisades Media Group, Santa Monica, Calif. Roger A. Schaffner, pres. — media buying, Miramax.

Serino Coyne, New York. Nancy Coyne, CEO. — Buena Vista Theatrical Group.

Solomon Friedman Advertising, Bloomfield Hills, Mich. Dean A. Friedman, pres. — media svcs.

83 Doctor's Associates

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$168	\$217	-22.5
Newspaper	714	456	56.6
National newspaper	409	13	NA
Outdoor	2,476	1,712	44.6
Network TV	127,444	104,828	21.6
Spot TV	86,994	86,988	0.0
Syndicated TV	17,391	10,997	58.1
Cable TV networks	23,854	19,044	25.3
Network radio	NA	1,003	NA
National spot radio	164	146	12.4
Internet	1,829	4	NA
Spanish-language TV	7,274	6,902	5.4
Business publications	111	158	-29.6
Measured media	268,828	232,466	15.6
Unmeasured media	139,074	120,263	15.6
Total	407,902	352,729	15.6
By brand	2003	2002	% chg
Subway restaurants	268,828	232,466	15.6

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$6,818	\$6,047	12.8
U.S.	2003	2002	% chg
Sales	5,699	5,200	9.6

Headquarters

Doctor's Associates/325 Bic Dr., Milford, Conn. 06460/Phone: (203) 877-4281.

Notes

Financial returns for Doctor's Associates are from Technomic and represent systemwide sales for Subway.

Personnel, brands, agencies

Corporate: Peter Buck, chmn; Frederick DeLuca, pres & CEO; Bill Schettini, chief mktg officer; Chris Carroll, mktg dir-Subway Franchisee Adv Fund Trust.

Subway Franchisee Advertising Fund Trust: 325 Bic Dr., Milford, Conn. 06460/Phone: (203) 877-4281. Cindy Eadie, exec dir; James Hansen, chmn; Chris Carroll, mktg dir; Ted Wirth, mgr-adv & creative svcs.

Agency in review.

Ryan Partnership, Westport, Conn. Paul Kramer, pres; Paulina Connolly, VP-creative svcs; Lydia Kennedy, sr prog mgr. — merchandising, Subway.

MediaCom, New York. Peter Olson, sr VP & mgr-natl bdcst; Larry Swyer, exec VP & grp dir. — media buying, Subway.

La Comunidad, Miami. Gary Bassel, pres; Jose Molla, creative dir; Caroline Wu, acct super. — Hispanic adv, Subway.

McCarthy Mambro Bertino Advertising, Boston. Joe McCarthy, CEO; Fred Bertino, pres & creative dir; Jamie Mambro, creative dir. — special projects, Subway.

Fleishman-Hillard, New York. Heidi Hovland, sr VP & sr ptnr-mktg comms. — public relations, Subway.

48 Federated Department Stores

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$24,394	\$23,735	2.8
Sunday magazine	1,622	995	63.0
Newspaper	450,483	478,704	-5.9
National newspaper	43,185	42,551	1.5
Outdoor	1,851	1,349	37.2
Spot TV	80,195	62,473	28.4
National spot radio	3,614	4,200	-13.9
Internet	9,344	7,608	22.8
Business publications	117	111	5.4
Local magazines	891	837	6.4
Measured media	615,696	622,565	-1.1
Unmeasured media	91,494	92,514	-1.1
Total	707,190	715,080	-1.1
By brand	2003	2002	% chg
Macy's dept stores	363,826	395,055	-7.9
Bloomingdales dept stores	70,006	66,207	5.7
Lazarus dept stores	68,724	44,897	53.1
Burdines dept stores	36,148	35,523	1.8
Rich's dept stores	33,969	35,471	-4.2
Bon Marche dept stores	25,796	27,381	-5.8

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$15,264	\$15,435	-1.1
Earnings	693	818	-15.3

Sales & earnings (\$ in millions)

U.S.	2003	2002	% chg
Sales	15,264	15,435	-1.1
Operating income	1,341	1,343	-0.1

Headquarters

Federated Department Stores/7 W. Seventh St., Cincinnati, Ohio 45202/Phone: (513) 579-7000.

Personnel, brands, agencies

Corporate: Terry Lundgren, chmn, pres & CEO.

Bloomingdale's: 1000 Third Ave., New York, N.Y. 10022/Phone: (212) 705-2000. Michael Gould, chmn & CEO; Tony Spring, exec VP-mktg; John Funck, sr VP-creative.

In-house.

Bon-Macy's: Third Ave. & Pine St., Seattle, Wash. 98181/Phone: (206) 344-2121. Dan Edelman, chmn & CEO; Jack Arndt, sr VP-mktg & sls promo; Mark Gordon, photo studio dir; Brent Frerichs, VP-media svcs & analysis; Sue Sleeth, media plng mgr; Val Walser, VP-adv prods & opers; Mary Jean Stephens, div VP-special events & pr.

Lowe & Partners Worldwide, New York. Susan Cantor, pres-Lowe N.Y.

In-house.

Burdines-Macy's: 22 E. Flagler St., Miami, Fla. 33131/Phone: (305) 835-5151. Tim Adams, chmn & CEO; Carey Watson, sr VP-mktg; Gilbert Lorenzo, VP-adv admin & prodn; Ron Rodriguez, VP-special events & publicity; Richard Todaro, VP-creative; Lisa Kauffman, VP-adv.

Lowe & Partners Worldwide, New York. Susan Cantor, pres-Lowe N.Y.

In-house.

Macy's East: 151 W. 34th St., New York, N.Y. 10001/Phone: (212) 695-4400. Ronald Klein, chmn & CEO; James Gray, pres & chief operating officer; Martine Reardon, exec VP-mktg.

Lowe & Partners Worldwide, New York. Susan Cantor, pres-Lowe N.Y.

In-house.

Macy's Home Store: 151 W. 34th St., New York, N.Y. 10001/Phone: 212-695-4400. Eric Salus, pres; Susan Mesec, sr VP-mktg; Ed Little, VP creative.

Lowe & Partners Worldwide, New York. Susan Cantor, pres-Lowe N.Y.

In-house.

Macy's West: 50 O'Farrell St., San Francisco, Calif. 94120/Phone: (415) 397-3333. Robert Mettler, pres; Sheila Field, sr VP-mktg & sls promo; Jane McGinnis, VP-adv finance; Sally Cohen, VP-sls promo; Stacey Osborn, VP-adv & promo; Alexandra Robinson, dir-direct mail media; Jane Kelley, dir-bdcst media; LaTonya Lawson, dir-new media; Brian Weart, dir-acct execs; Pat Holt, dir-ROP creative; Kelly Keenan, dir-direct mail creative.

Lowe & Partners Worldwide, New York. Susan Cantor, pres-Lowe N.Y.

In-house.

Rich's/Lazarus/Goldsmith's-Macy's: 223 Perimeter Center Pkwy., Atlanta, Ga. 30346/Phone: (770) 913-4000. David Nichols,

pres; Diann Mahood, exec VP-mktg; Steve Weinbaum, dir-adv plng; Susan Hancock, div VP-special events; Robin Gagnon, VP-strategic mktg; Karen Martin, div VP & dir-adv admin; Steven Cohen, div VP & dir-creative; Mark Walsh, dir-ptnrship mktg.

Lowe & Partners Worldwide, New York. Susan Cantor, pres-Lowe N.Y.

In-house.

Initiative Media Worldwide, Atlanta. Rob Claxton, exec VP & gm. — media buying.

6 Ford Motor Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$278,426	\$258,135	7.9
Sunday magazine	4,300	2,797	53.7
Newspaper	147,561	128,924	14.5
National newspaper	45,424	52,564	-13.6
Outdoor	10,467	8,607	21.6
Network TV	449,614	437,897	2.7
Spot TV	277,769	344,611	-19.4
Syndicated TV	12,036	23,582	-49.0
Cable TV networks	104,559	106,961	-2.2
Network radio	23,812	15,245	56.2
National spot radio	8,402	6,042	39.1
Internet	25,773	23,795	8.3
Yellow Pages	21,663	22,935	-5.5
Spanish-language TV	26,115	15,524	68.2
Business publications	6,973	7,131	-2.2
Local magazines	1,618	1,421	13.9
Measured media	1,444,511	1,456,169	-0.8
Unmeasured media	789,279	795,648	-0.8
Total	2,233,790	2,251,817	-0.8
By brand	2003	2002	% chg
Ford vehicles	853,127	881,288	-3.2
Lincoln vehicles	142,919	152,538	-6.3
Jaguar vehicles	87,758	84,055	4.4
Lincoln/Mercury vehicles	84,457	15,853	432.7
Land Rover vehicles	58,787	71,942	-18.3
Hertz car rental	57,621	58,849	-2.1
Volvo vehicles	56,465	48,749	15.8
Mercury vehicles	48,170	80,928	-40.5
Ford genuine parts & service	27,741	34,363	-19.3

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$164,196	\$162,256	1.2
Earnings	495	-980	NA
U.S.	2003	2002	% chg
Sales	103,435	108,214	-4.4
Division sales	2003	2002	% chg
Automotive	138,442	134,273	3.1
Ford Credit	20,125	22,541	-10.7
Hertz	5,200	4,945	5.2
Other fin svcs	429	497	-13.7

Headquarters

Ford Motor Co./World Headquarters, One American Rd., Dearborn, Mich. 48126/Phone: (313) 322-3000.

Personnel, brands, agencies

Corporate: William Clay Ford, Jr., chmn & CEO; Nick V. Scheele, pres; James J. Padilla, chief operating officer & chmn-automotive ops; Mark Fields, exec VP-Ford Europe & Premier

Automotive Group; Greg C. Smith, exec VP & pres-Americas; James G. O'Connor, grp VP-N. Amer. mktg, sls & svc.

Ogilvy & Mather Worldwide, Detroit. Jan Starr, exec VP & mg dir.

Ford Motor Media, Detroit. Kevin Brown, exec dir. — media buying.

Beanstalk Group, New York. Seth M. Siegel, exec VP & chmn-licensing. — licensing.

PanCom, Los Angeles. Young M. Kim, pres & CEO. — Asian-American adv.

UniWorld Group, New York. Byron Lewis, chmn & CEO. — African-American adv & media buying.

Zubi Advertising Services, Coral Gables, Fla. Joe Zubizarreta, chief operating officer; Tim Swies, exec VP. — Hispanic adv & media buying.

Aston Martin North America: One Premier Place, Irvine, Calif. 92618-2922/Phone: (949) 341-6100. John Walton, VP & gm; Cristina Cheever, comms & mktg mgr.

S3, Boonton, N.J. Denise Soltys, pres & acct dir. — Aston Martin vehicles.

Ford Customer Service Division: World Headquarters, One American Rd., Dearborn, Mich. 48126/Phone: (313) 322-3000. Francisco Codina, VP-Ford Motor Co. & pres-Ford Customer Service Division.

Ogilvy & Mather Worldwide, Detroit. Jan Starr, exec VP & mg dir. — Genuine Ford & Lincoln Mercury parts & service.

Ford Motor Media, Detroit. Kevin Brown, exec dir. — media buying.

Ford Division: Regent Court, 16800 Executive Plaza Dr., Dearborn, Mich. 48126/Phone: (313) 322-3000. Stephen G. Lyons, pres; Martin Collins, genl mktg mgr; Ben Poore, car grp mktg mgr; Douglas W. Scott, truck grp mktg mgr; Christine M. Feuell, SUV grp mktg mgr; Richard Stoddart, mktg comms mgr.

J. Walter Thompson Co., Detroit. Sean Neall, global bus dir; Barb Resnicoff Brown, exec mgmt dir. — Ford vehicles.

Ford Motor Media, Detroit. Kevin Brown, exec dir. — media buying.

UniWorld Group, New York. Byron Lewis, chmn & CEO. — African-American adv & media buying.

Zubi Advertising Services, Coral Gables, Fla. Joe Zubizarreta, chief operating officer; Tim Swies, exec VP. — Hispanic adv & media buying.

Hertz Corp.: 225 Brae Blvd., Park Ridge, N.J. 07656/Phone: (201) 307-2000. Craig R. Koch, chmn & CEO; Brian J. Kennedy, exec VP-mktg & sls; Frank Camacho, staff VP-mktg, U.S. Rent-A-Car; Janet Smyth, div VP-mktg svcs.

DDB Worldwide Communications, New York. Nina Gramaglia, acct svcs dir. — Hertz vehicle rental.

Jaguar North America: One Premier Pl., Irvine, Calif. 92618/Phone: (949) 341-6100. Mike O'Driscoll, pres; CJ (Connell) O'Donnell, exec VP-sls & mktg; Gary Temple, VP-cust care; George Ayres, VP-mktg; Mark Scarpato, VP-retail ops; Panas Anastasios, VP-franchising; David Smart, VP-finance; James Thomas, comms dir.

Y&R Advertising, Irvine, Calif. Steve Patterson, sr VP & brand team leader. — Jaguar vehicles.

Ford Motor Media, Detroit. Kevin Brown, exec dir. — media buying.

Mediaedge:cia Worldwide, Detroit. Charles Courtier, exec chmn ww; Jack Valente, mg ptr. — media comms svcs.

Bravo Group, Miami. Mary Miqueli, VP & gm. — Hispanic strategy & media plng.

Global Beach, Irvine, Calif. Matt Passey, acct dir. — interactive mktg.

Landor, Irvine, Calif. Cortney Reeser, mg dir. — sls promo.

UniWorld Group, New York. Earl Black, assoc media dir. — African-American strategy & media buying.

Witeck Combs & Prime Access, Washington. Wesley Combs, pres. — gay, lesbian, bisexual & transgendered mktg.

Wunderman, Irvine, Calif. Dan Olson, VP & mg dir. — direct mktg.

Zubi Advertising Services, Coral Gables, Fla. Joe Zubizarreta, chief operating officer; Tim Swies, exec VP. — Hispanic media buying.

Land Rover North America: One Premier Place, Irvine, Calif. 92618/Phone: (949) 341-6100. Mike O'Driscoll, pres; Richard Beattie, exec VP-sls & mktg; Pat Ward, VP-retail opers; Geoff Cousins, VP-remktg & dist; Gary Temple, VP-cust care; Sally Eastwood, VP-mktg.

Y&R Advertising, Irvine, Calif. Steve Patterson, sr VP & brand team leader. — Land Rover vehicles.

Ford Motor Media, Detroit. Kevin Brown, exec dir. — media buying.

Mediaedge:cia Worldwide, Irvine, Calif. Charles Courtier, exec chmn ww; Jack Valente, mg ptr. — media comms svcs.

A Team, Irvine, Calif. Andrew Cohen, CEO. — sls promo.

Bravo Group, Miami. Mary Miqueli, VP & gm. — Hispanic strategy & media plng.

UniWorld Group, New York. Earl Black, assoc media dir. — African-American strategy & media buying.

Witeck Combs & Prime Access, Washington. Wesley Combs, pres. — Gay, lesbian, bisexual & transgendered mktg.

Zubi Advertising Services, Coral Gables, Fla. Joe Zubizarreta, chief operating officer; Tim Swies, exec VP. — Hispanic media buying.

Lincoln Mercury: Regent Court Bldg., 16800 Executive Plaza Dr., Dearborn, Mich. 48126/Phone: 313-322-3000. Darryl Hazel, pres; John Fitzpatrick, genl mktg mgr; Tom Grill, mktg comms mgr; Pete Gilfillan, grp brand mgr-Lincoln Mercury.

Y&R Advertising, Irvine, Calif. David Latta, exec VP & client leader. — Lincoln vehicles, Mercury vehicles.

Ford Motor Media, Detroit. Kevin Brown, exec dir. — media buying.

UniWorld Group, New York. Byron Lewis, chmn & CEO; Chuck Morrison, exec VP & genl mgr. — African-American adv, media buying, event promotion & PR.

Zubi Advertising Services, Coral Gables, Fla. Joe Zubizarreta, chief operating officer; Tim Swies, exec VP; Joe Castro, exec VP. — Hispanic adv & media buying.

Volvo Cars of North America: One Premier Place, Irvine, Calif. 92618/Phone: (949) 341-6500. Vic H. Doolan, pres & CEO; Thomas Andersson, exec VP-mktg; Roger Omisher, VP-public affairs; Linda Gangeri, natl adv mgr.

Euro RSCG Worldwide, New York & Irvine, Calif. Chris Ross, global acct dir; Tony Taylor, grp acct dir (tactical); Max Hegerman, natl acct dir (brand). — Volvo vehicles.

Ford Motor Media, Detroit. Kevin Brown, exec dir. — media buying.

PanCom, Los Angeles. Young M. Kim, pres & CEO. — Asian-American adv.

Witeck Combs & Prime Access, Washington. Wesley Combs, pres. — Gay & lesbian mktg.

Zubi Advertising Services, Coral Gables, Fla. Joe Zubizarreta, chief operating officer; Tim Swies, exec VP. — Hispanic media buying.

67 Gap Inc.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$55,342	\$51,363	7.7
Sunday magazine	4,193	5,023	-16.5
Newspaper	8,025	6,102	31.5
National newspaper	6,127	4,486	36.6
Outdoor	9,412	9,720	-3.2
Network TV	176,860	155,670	13.6
Spot TV	11,983	17,118	-30.0
Syndicated TV	46,208	37,155	24.4
Cable TV networks	33,410	31,535	5.9
National spot radio	4,341	4,770	-9.0
Internet	12,866	10,629	21.1
Spanish-language TV	5,123	NA	NA
Business publications	11	43	-74.7
Local magazines	25	90	-72.0
Measured media	373,926	333,703	12.1
Unmeasured media	111,886	99,850	12.1
Total	485,813	433,554	12.1
By brand	2003	2002	% chg
Old Navy clothing stores ...	188,707	162,555	16.1
Gap clothing stores	145,952	141,173	3.4
Banana Republic clothing stores ..	39,267	29,873	31.4

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$15,854	\$14,455	9.7
Earnings	1,030	477	115.9
North America	2003	2002	% chg
Sales	13,600	12,600	7.9

Headquarters

Gap Inc./2 Folsom St., San Francisco, Calif. 94105/Phone: (650) 952-4400.

Personnel, brands, agencies

Corporate: Paul Pressler, pres & CEO; Robert Fisher, chmn.

Banana Republic: 2 Folsom St., San Francisco, Calif. 94105/Phone: (650) 952-4400. Marka Hansen, pres; Jack Calhoun, exec VP-mktg; Steve Stickel, sr VP-stores & opers; Deborah Lloyd, exec VP-prod design & devel.

In-house.

PHD, San Francisco. Jeanne Selvester, gm. — print media svcs.
Starcom, Chicago. Jack Sullivan, sr VP, dir. — out-of-home buying.

Gap: 1 Harrison St., San Francisco, Calif. 94105/Phone: (650) 952-4400. Gary Muto, pres; Lee Bird, exec VP & chief operating officer; Pina Ferlisi, sr VP-design & prod devel.

Laird & Partners, New York. Trey Laird, founder.

Corinthian Media, New York. Ellen Carry, exec VP, acct svcs. — TV buying.

PHD, New York. Steve Grubbs, CEO-N. Amer.; Harry Keeshan, exec VP-natl bdcst. — TV buying.

Starcom, Chicago. Jack Sullivan, sr VP, dir. — out-of-home buying.

Gap Inc. Direct: 2 Folsom St., San Francisco, Calif. 94105/Phone: (650) 952-4400. Toby Lenk, pres.

In-house.

Old Navy: 2 Folsom St., San Francisco, Calif. 94105/Phone: (650) 952-4400. Jenny J. Ming, pres; Tom Sands, exec VP-stores & ops.

Deutsch, Los Angeles. Mike Sheldon, mg ptrn & gm.

J.L. Media, New Jersey, N.J. Rich Russo, dir-bdcst svcs. — radio buying.

PHD, New York. Harry Keeshan, exec VP-natl bdcst. — TV buying.

Starcom, Chicago. Jack Sullivan, sr VP, dir. — out-of-home buying.

Vidal Partnership, New York. Sandra Alfaro, grp acct dir. — Hispanic adv.

13 General Electric Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$96,371	\$77,101	25.0
Sunday magazine	3,601	2,135	68.7
Newspaper	125,364	108,213	15.8
National newspaper	35,956	32,916	9.2
Outdoor	13,281	12,357	7.5
Network TV	228,183	181,073	26.0
Spot TV	43,169	57,141	-24.5
Syndicated TV	17,124	9,173	86.7
Cable TV networks	94,109	64,101	46.8
Network radio	8,739	7,084	23.4
National spot radio	36,647	22,251	64.7
Internet	42,075	13,853	203.7
Yellow Pages	6,500	7,500	-13.3
Spanish-language TV	11,976	8,860	35.2
Business publications	24,532	24,125	1.7
Local magazines	214	186	14.6
Measured media	787,838	628,066	25.4
Unmeasured media	787,838	628,066	25.4
Total	1,575,677	1,256,133	25.4
By brand	2003	2002	% chg
Universal movies & recordings	415,448	356,070	16.7
GE appliances, lighting, & fin svcs	148,794	121,285	22.7
USA cable network	59,384	28,716	106.8
NBC TV network	52,829	61,759	-14.5
Bravo cable channel	11,122	8,655	28.5

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$134,187	\$132,210	1.5
Earnings	15,002	14,118	6.3
U.S.	2003	2002	% chg
Sales	84,795	90,954	-6.8
Division sales	2003	2002	% chg
Insurance	26,194	23,296	12.4
Commercial finance	20,813	19,592	6.2
Energy	19,082	23,633	-19.3
Transportation	13,515	13,685	-1.2

Sales & earnings (\$ in millions)

Division sales	2003	2002	% chg
Consumer finance	12,845	10,266	25.1
Consumer & industrial	12,843	12,887	-0.3
Healthcare	10,198	8,955	13.9
Advanced materials	7,078	6,963	1.7
NBC	6,871	7,149	-3.9
Equipment & other services	4,427	5,545	-20.2
Infrastructure	3,078	1,901	61.9

Headquarters

General Electric Co./3135 Easton Turnpike, Fairfield, Conn. 06828/Phone: (203) 373-2211.

Notes

In May 2004, General Electric and Vivendi Universal merged NBC and Vivendi Universal Entertainment (VUE), forming NBC Universal. The resulting entity is 80% owned by GE and 20% by Vivendi. The two generated a combined \$13.7 billion revenue in 2003. VUE includes Universal Pictures Group (theatrical, home video, TV production), Universal Television Group (cable TV units USA Network, SciFi and Trio) and Universal theme parks and resorts in Los Angeles, Orlando, Osaka and Barcelona. NBC Universal is led by NBC exec Bob Wright as chairman and CEO. GE obtained Bravo from Cablevision Systems Corporation for \$1.25 billion in December 2002.

Personnel, brands, agencies

Corporate: Jeffrey R. Immelt, chmn & CEO; Beth Comstock, chief mktg officer & corp VP mktg; Judy L. Hu, gm-global adv & brand.

BBDO Worldwide, New York. Fiona Carter, exec VP & sr acct dir.

GE Consumer & Industrial: Louisville, Ky. 40225/Phone: (502) 452-4311. Lloyd G. Trotter, pres & CEO; James P. Campbell, pres & CEO-Americas; Paul Klein, mgr-adv, cons & commercial lighting prods & major appliances.

BBDO Worldwide, New York. Fiona Carter, exec VP & sr acct dir.

OMD Worldwide, New York. Toni Racioppo, plng/print. — media svcs.

GE Consumer Finance: 1600 Summer St., Stamford, Conn. 06905/Phone: (203) 357-4000. David R. Nissen, pres & CEO.

No agency.

GE Insurance: 6604 W. Broad St, Richmond, Va. 23230/Phone: (804) 662-2400. Ronald R. Pressman, pres & CEO-GE Insurance & Employers Reinsurance Corporation; Michael D. Fraizer, pres & CEO-Genworth Financial.

NBC Universal: 30 Rockefeller Plaza, New York, N.Y. 10112/Phone: (212) 664-4444. Bob Wright, vice chmn-GE, chmn & CEO, NBC Universal; Keith Turner, pres-NBC Universal sls & mktg; Alan Wurtzel, pres-rsch & media devel; Frank Radice, sr VP-adv & promo; Jay Linden, exec VP-NBC Connect; Ed O'Donnell, sr VP-mktg.

DDB Worldwide Communications, Los Angeles. Gary Fountain, chief operating officer & grp acct dir. — Universal Pictures.

OMD Worldwide, Los Angeles. Chris Geraci, dir. — media buying, bdcst buying, Universal.

MediaVest, Los Angeles. Tom Szczepanski, sr VP & mg dir. — media svcs, NBC TV Network.

35 General Mills

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$31,779	\$39,607	-19.8
Sunday magazine	7,420	2,420	206.5
Newspaper	209	146	43.4
Outdoor	1,020	950	7.4
Network TV	201,147	205,987	-2.3
Spot TV	219,797	209,449	4.9
Syndicated TV	478	12,267	-96.1
Cable TV networks	131,815	119,842	10.0
Network radio	3,130	3,246	-3.6
National spot radio	1,159	1,683	-31.1
Internet	3,922	3,679	6.6
Spanish-language TV	10,218	11,411	-10.5
Business publications	3,794	4,264	-11.0
Local magazines	9	NA	NA
Measured media	615,897	614,951	0.2
Unmeasured media	339,704	339,182	0.2
Total	955,601	954,133	.2
By brand	2003	2002	% chg
General Mills cereals	289,671	227,169	27.5
Yoplait yogurt	86,845	80,099	8.4
Pillsbury bakery products	79,948	117,526	-32.0
Betty Crocker food products	56,918	58,462	-2.6
Progresso soup	33,288	42,062	-20.9
Chex Mix snack mix	19,776	6,139	222.1
Pop-Secret popcorn	11,170	10,728	4.1

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$10,506	\$7,949	32.2
Earnings	917	458	100.2
U.S.	2003	2002	% chg
Sales	9,144	7,139	28.1
Earnings before income taxes	1,272	653	94.8
Division sales	2003	2002	% chg
U.S. retail	7,407	5,907	25.4
Bakeries & foodservice	1,799	1,264	42.3
International	1,300	778	67.1

Headquarters

General Mills/1 General Mills Blvd., Minneapolis, Minn. 55426/Phone: (763) 764-2311.

Personnel, brands, agencies

Corporate: Stephen Sanger, chmn & CEO; Mark Addicks, chief mktg officer; Rick Hosfield, VP-adv; Doug Moore, VP-adv & branding.

Consumer Foods: 1 General Mills Blvd., Minneapolis, Minn. 55426/Phone: (763) 764-2311. Peter Capell, sr VP & pres-Big G cereals; John Machusick, sr VP & pres-foodservice; Chris O'Leary, sr VP-meals; Bob Waldron, sr VP & pres-Yoplait USA; Kim Nelson, sr VP & pres-Snacks Unlimited; Jeffrey Rotsch, sr VP-slcs; Brooks Gekler, VP & gm-Lloyd's Barbeque; Juliana Chugg, pres-baking prods; Peter Robinson, pres-Pillsbury USA.

Campbell Mithun, Minneapolis. Mike Nelson, exec VP & mgmt super; Shawne Murphy-Johnston, VP & mgmt super. — Bacos, Betty Crocker Complete Meals, Betty Crocker Desserts, Bisquick, Bowl Appetit, Bugles, Chex Cereal, Chex Mix, Cinnamon Toast Crunch, Gardetto's, Golden Grahams, Hamburger & Chicken

Helper, Harmony, Honey Nut Chex, Lloyd's, Milk N' Cereal Bars, Nature Valley Cereal, Nature Valley granola bars, Oatmeal Crisp Fruit & Cereal Bars, Pop Secret, Specialty Potatoes, Suddenly Salad, Tuna Helper.

Saatchi & Saatchi, New York. Michael Burns, co-CEO; Peter Hubbell, global equity dir-Pillsbury/Meals; Anne Adriance, exec VP & sr grp acct dir-General Mills; Anita May, sr grp acct dir-General Mills Cereals; Mary Haskin, grp acct dir-Yoplait/Betty Crocker. — Apple Cinnamon Cheerios, Berry Burst Cheerios, Cheerios, Cocoa Puffs, Columbo Yogurt, Cookie Crisp, Country Corn Flakes, Dunkaroos, Fiber One, Frosted Cheerios, Fruit by the Foot, Fruit Roll-Ups, GoGurt, Green Giant, Gushers, Honey Nut Cheerios, Honey Nut Clusters, Kaboom, Kix, Lucky Charms, Monster Cereals, MultiGrain Cheerios, Nouriche, Oatmeal Crisp, Progresso Soups, Old El Paso, Pillsbury Frozen Baked Goods/Breakfast, Pillsbury Breads/Biscuits, Pillsbury Refrigerated Baked Goods, Reese's Puffs, Total, Total Corn Flakes, Total Raisin Bran, Totino's Pizza & Snacks, Trix, Trix yogurt, Wheaties, Yoplait, Yoplait Whips, Yumsters.

Schafer Condon Carter, Chicago. Mark Schafer, mg ptrn - creative. — Foodservice.

Zenith Media, New York. Allen Banks, acct exec. — media svcs.

Burrell Communications Group, Chicago. Fay Ferguson, mg dir; Karen Goodar, VP & acct mgmt dir. — African-American adv.

Casanova Pendrill Publicidad, Costa Mesa, Calif. Daniel Avina, acct exec; Bryan Garcia, acct dir. — Hispanic adv, Cheerios, Honey Nut Cheerios, Kix, Yoplait.

Small Planet Foods: 719 Metcalf St., Sedro-Woolley, Wash. 98284/Phone: 800-624-4123. Maria Morgan, pres; John DePaolis, head mktg guy.

Sterling Rice Group, Boulder, Colo. Dan Vorlage, sr acct mgr. — Cascadian Farm, Muir Glen.

1 General Motors Corp.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$453,762	\$394,424	15.0
Sunday magazine	1,460	4,770	-69.4
Newspaper	217,323	181,936	19.5
National newspaper	57,026	46,406	22.9
Outdoor	32,309	28,940	11.6
Network TV	641,423	727,217	-11.8
Spot TV	393,011	531,966	-26.1
Syndicated TV	49,138	17,071	187.9
Cable TV networks	311,270	296,745	4.9
Network radio	36,066	16,167	123.1
National spot radio	16,420	18,752	-12.4
Internet	47,978	40,683	17.9
Yellow Pages	38,907	35,286	10.3
Spanish-language TV	59,006	47,943	23.1
Business publications	10,671	10,388	2.7
Local magazines	834	777	7.3
Measured media	2,366,605	2,399,469	-1.4
Unmeasured media	1,063,257	1,078,022	-1.4
Total	3,429,862	3,477,491	-1.4
By brand	2003	2002	% chg
Chevrolet vehicles	687,038	852,462	-19.4
General Motors corporate	378,569	251,518	50.5
Saturn vehicles	226,947	216,138	5.0
Cadillac vehicles	207,449	223,622	-7.2

U.S. ad spending (\$ in thousands)

By brand	2003	2002	% chg
GMC vehicles	193,230	228,184	-15.3
Pontiac vehicles	176,580	155,177	13.8
Buick vehicles	139,842	170,328	-17.9
Hummer vehicles	89,103	45,014	97.9
Saab vehicles	79,680	61,678	29.2
Ditech.com financial services	73,612	78,363	-6.1
OnStar vehicle monitoring	47,010	12,116	288.0
GMAC financial services	19,454	20,810	-6.5

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$185,524	\$177,324	4.6
Earnings	3,822	1,736	120.2
U.S.	2003	2002	% chg
Sales	133,897	129,781	3.2
Division sales	2003	2002	% chg
Automotive & other	155,831	150,250	3.7
Financing & insurance ops.	29,693	27,074	9.7

Headquarters

General Motors Corp./300 Renaissance Center, P.O. Box 300, Detroit, Mich. 48265-2000/Phone: (313) 556-5000.

Notes

General Motors Corp. sold 34% of DirecTV Group (formerly known as Hughes Electronics Corp.) to News Corp. in 2003. The stake gave News Corp. control of DBS provider, DirecTV.

Personnel, brands, agencies

Corporate: Rick Wagoner, chmn & CEO; Robert A. Lutz, vice chmn-prod devel & chmn, GM N. Amer.; Gary L. Cowger, pres-GM N. Amer.; Thomas J. Kowaleski, VP-comms; John F. Smith, grp VP-N. Amer. vehicle sls, svc & mktg; John G. Middlebrook, VP-mktg & adv; Roger W. Adams, exec dir-adv, mktg & CRM; Tim Roush, dir-adv, mktg & strategic ops; Marissa Sison, dir-adv research; Elizabeth Lazar, genl dir-media ops; Ken Wechselberger, genl dir-local mktg grps & dealer co-op mktg; Candace Robbins, dir, co-op mktg; Steve Tihanyi, genl dir-mktg alliances & regional ops; Steve Hill, dir-retail plng & GM brand; Jack Bowen, genl dir-CRM.

McCann Erickson Worldwide, Detroit. Garry Neel, exec VP & mg dir. — GM corporate adv.

Mullen, Wenham, Mass. George Rogers, acct dir. — GM credit card, GM used cars.

General Motors Planworks, Detroit. Dennis Donlin, pres. — media plng.

General Motors Mediaworks, Warren, Mich. Linda Thomas Brooks, exec VP & mg dir. — media buying.

General Motors R*Works, Detroit. Ray Volpe, chmn & CEO. — sponsorships & event mktg.

A Partnership, New York. Jeannie Yuen, CEO. — Asian-American adv.

Accentmarketing, Coral Gables, Fla. Marta Noa, sr VP & acct dir. — Hispanic adv.

Digitas, Boston. Rob Willms, pres-Digitas Boston, London, San Francisco. — interactive mktg, GM BuyPower.

Pulse Marketing, Royal Oak, Mich. David Bethards, exec VP & mg dir. — sls promo.

Carol H. Williams Advertising, Oakland, Calif. Carol H. Williams, pres & CEO. — African-American adv.

Buick Motor Division: 100 Renaissance Center, 482-A32-B45,

Detroit, Mich. 48265-1000/Phone: (313) 556-5000. Roger Adams, mktg gm; Randall Tallerico, dir-adv & sls promo; Michael Hand, adv & promo mgr; Jill Cooley, adv & promo mgr; Larry Peck, golf mktg mgr; Paul Arata, field adv mgr.

McCann Erickson Worldwide, Troy, Mich. Garry Neel, exec VP & mg dir. — Buick vehicles.

General Motors Planworks, Detroit. Dennis Donlin, pres. — media plng.

General Motors Mediaworks, Warren, Mich. Linda Thomas Brooks, exec VP & mg dir. — media buying.

Accentmarketing, Coral Gables, Fla. Marta Noa, sr VP & acct dir. — Hispanic adv, retail.

i33, Detroit. Peter Galio, dir-client svcs. — interactive mktg.

Momentum Worldwide, Troy, Mich. Bruce Florine, pres. — sls promo.

MRM Partners, Troy, Mich. Chris Batchik, sr VP & grp acct dir. — relationship mktg.

Cadillac Motor Car Division: 100 Renaissance Center, Detroit, Mich. 48265/Phone: (313) 667-5562. Mark LaNeve, mktg gm; John Howell, prod dir; Tim O'Neill, adv mgr; William Waldron, adv mgr; Jay Spenchian, mktg dir.

chemistri, Troy, Mich. Michael Wright, sr VP & grp acct dir. — Cadillac vehicles.

General Motors Planworks, Detroit. Dennis Donlin, pres. — media plng.

General Motors Mediaworks, Warren, Mich. Linda Thomas Brooks, exec VP & mg dir. — media buying.

Accentmarketing, Coral Gables, Fla. Marta Noa, sr VP & acct dir. — Hispanic adv, retail.

Digitas, Boston. Rob Willms, pres-Digitas Boston, London, San Francisco. — direct mktg.

Chevrolet Motor Division: 100 Renaissance Center, Detroit, Mich. 48265-1000/Phone: (313) 556-5000. Brent Dewar, mktg gm; Joe Jacuzzi, dir-comms; Kim Kosak, genl dir-adv & sls promo; James D. Jandasek, natl mgr-passenger car adv & sls promo; Robert (Mac) Whisner, natl mgr-truck adv & sls promo.

Campbell-Ewald, Warren, Mich. Mike Ryan, vice chmn & chief operating officer; Andrea Wells, Chevrolet acct dir.

General Motors Planworks, Detroit. Dennis Donlin, pres. — media plng.

General Motors Mediaworks, Warren, Mich. Linda Thomas Brooks, exec VP & mg dir. — media buying.

Accentmarketing, Coral Gables, Fla. Marta Noa, sr VP & acct dir. — Hispanic adv.

General Motors Service & Parts Operations: 6200 Grand Pointe Dr., Grand Blanc, Mich. 48439/Phone: (810) 606-2000. Douglas J. Herberger, VP & gm.

Campbell-Ewald, Southfield, Mich. James P. Huchok, exec VP & acct dir. — ACDelco.

chemistri, Troy, Mich. Michael Talovich, sr VP & acct dir. — GM Parts, GM Goodwrench service, accessories, performance parts.

GMAC: 300 Galleria Officentre, Ste. 507, Southfield, Mich. 48034/Phone: (248) 263-3070. Eric A. Feldstein, pres; John E. Gibson, exec VP-N. Amer. ops; Donald M. Fergusson, VP-GMAC adv & relationship mktg.

Campbell-Ewald, Warren, Mich. James P. Huchok, exec VP & acct dir. — GMAC financial svcs.

chemistri, Troy, Mich. Thomas Downey, sr VP & grp acct dir. — GMAC business to business.

Pulse Marketing, Royal Oak, Mich. David Bethards, exec VP & mg dir. — sls promo.

GMAC Residential Holdings: 100 Witmer Rd., P.O. Box 963, Horsham, Pa. 19044/Phone: (215) 682-1000. David Applegate, pres & CEO; Richard Gillespie, exec VP & chief mktg officer.

Agencies assigned on a project basis. — Ditech.com, GMAC Global Relocation, GMAC Mortgage, GMAC Real Estate.

General Motors Mediaworks, New York. Linda Thomas Brooks, exec VP & mg dir. — media plng, Ditech.com.

Hummer: 100 Renaissance Center, 482-A22-B98, Detroit, Mich. 48265-1000/Phone: (313) 665-1211. Michael C. DiGiovanni, gm; Marc Hernandez, H2 mktg dir; Liz Vanzura, adv & promo dir.

Modernista!, Boston. Lance Jensen, co-owner; Gary Koepke, co-owner. — Hummer vehicles.

General Motors Planworks, Detroit. Dennis Donlin, pres. — media plng.

General Motors Mediaworks, Warren, Mich. Linda Thomas Brooks, exec VP & mg dir. — media buying.

OnStar Corp.: 1400 Stephenson Hwy., Troy, Mich. 48083/Phone: (248) 588-6050. Chet Huber, pres; Tony DiSalle, VP-sls & mktg; Tim Conner, adv mgr.

Campbell-Ewald, Warren, Mich. Phil Mueller, sr VP & grp mgmt super. — OnStar vehicle monitoring system.

Digitas, Boston. Rob Willms, pres-Digitas Boston, London, San Francisco. — interactive mktg, dir mktg.

Pontiac-GMC Division: 100 Renaissance Center, P.O. Box 100, Detroit, Mich. 48265-1000/Phone: (313) 556-5000. Jim Bunnell, gm; Steven Rosenblum, mktg dir-GMC; Mark-Hans Richer, mktg dir-Pontiac; Craig Bierley, prod dir-GMC; Dennis Maraone, prod dir-Pontiac.

chemistri, Troy, Mich. Brian Durocher, sr VP & acct dir. — Pontiac vehicles.

Lowe & Partners Worldwide, New York. Todd Stanley, exec VP & mg dir. — GMC vehicles.

General Motors Planworks, Detroit. Dennis Donlin, pres. — media plng.

General Motors Mediaworks, Warren, Mich. Linda Thomas Brooks, exec VP & mg dir. — media buying.

Accentmarketing, Coral Gables, Fla. Marta Noa, sr VP & acct dir. — Hispanic adv.

Digitas, Boston. Rob Willms, pres-Digitas Boston, London, San Francisco. — Pontiac-GMC retail: dir mktg, interactive mktg, events & promotions.

Saab Cars USA: 4405-A International Blvd., Norcross, Ga. 30093/Phone: 770-279-0100. Debra Kelly-Ennis, pres & chief operating officer; Brian Sweeney, VP-sls; Jon Brancheau, VP-mktg; Kristi August, dir-integrated mktg.

Lowe & Partners Worldwide, New York. Claire Capeci, exec VP & mg dir.

General Motors Mediaworks, Warren, Mich. Linda Thomas Brooks, exec VP & mg dir. — media buying.

Carlson Marketing Group, Troy, Mich. Ed Barclay, exec VP & gm. — sls promo.

Digitas, Boston. Rob Willms, pres-Digitas Boston, London, San Francisco. — interactive mktg.

Saturn Corp.: 100 Renaissance Center, MC 482-A15-A91, Detroit, Mich. 48265-1000/Phone: (313) 665-5000. Annette K. Clayton, chmn & pres; Jill Lajdziak, gm; Sam Mancuso, exec dir-mktg; Scott McLaren, adv mgr.

Goodby, Silverstein & Partners, San Francisco. Brian Dunbar, grp acct dir; John Weber, acct dir-retail & VUE; Rene Cournoyer, acct dir-brand, Relay & L Series; Jennifer Fox, acct dir-ION & Red Line. — Saturn vehicles.

General Motors Planworks, Detroit. Dennis Donlin, pres. — media plng.

General Motors Mediaworks, Warren, Mich. Linda Thomas Brooks, exec VP & mg dir. — media buying.

52 Gillette Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$45,226	\$34,655	30.5
Sunday magazine .....	.553	NA	NA
Newspaper .....	.3,110	1,176	164.6
National newspaper .....	.418	112	274.3
Outdoor .....	.637	418	52.3
Network TV	141,099	138,412	1.9
Spot TV .....	.3,956	3,741	5.7
Syndicated TV .....	.50,612	30,882	63.9
Cable TV networks .....	.58,894	33,478	75.9
Network radio .....	.4,569	603	658.1
National spot radio .....	.574	2,128	-73.0
Internet .....	.1,007	1,997	-49.6
Spanish-language TV .....	.10,703	12,230	-12.5
Business publications .....	.353	471	-25.0
Local magazines .....	.26	13	100.8
Measured media .....	.321,734	260,315	23.6
Unmeasured media .....	.290,006	234,644	23.6
Total .....	.611,741	494,959	23.6
By brand	2003	2002	% chg
Gillette shaving products ...	.115,382	111,260	3.7
Oral-B dental products .....	.81,790	50,358	62.4
Duracell batteries .....	.64,180	52,776	21.6
Braun personal care products ..	.24,227	17,624	37.5
Right Guard anti-persp & deod ..	.22,677	16,926	34.0
Soft & Dri anti-persp & deod ..	.12,646	10,866	16.4

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$9,252	\$8,453	9.5
Earnings .....	.1,385	1,216	13.9
U.S.	2003	2002	% chg
Sales .....	.3,448	3,282	5.1
Pre-tax income, cont. ops. ....	.822	952	-13.7
Division sales	2003	2002	% chg
Blades & razors .....	.3,869	3,435	12.6
Duracell products .....	.2,015	1,898	6.2
Oral care .....	.1,327	1,248	6.3
Braun .....	.1,177	1,056	11.5
Personal care .....	.864	816	5.9

Headquarters

Gillette Co./Prudential Tower Bldg., Boston, Mass. 02199/Phone: (617) 421-7000.

Notes

Gillette's is acquiring Den-Mat's Rembrandt line of teeth-whitening products in 2004.

Personnel, brands, agencies

Corporate: James M. Kiltz, chmn, pres & CEO; Edward F. DeGraan, vice chmn; Peter Klein, sr VP-strategy & bus devel.

MindShare Worldwide, New York. Ernie Simon, strategic plng dir. — media svcs.

Blades & Razors: Prudential Tower Bldg., Boston, Mass. 02199/Phone: (617) 421-7000. Peter Hoffman, pres.

BBDO Worldwide, New York. Simon Marlow, exec VP & dir-multinatl client svcs. — Mach 3, Venus, Sensor3.

MindShare Worldwide, New York. Ernie Simon, strategic plng dir.

Braun: Prudential Tower Bldg., Boston, Mass. 02199/Phone: (617) 421-7000. Mark Leckie, pres.

BBDO Worldwide, New York. Simon Marlow, exec VP & dir-multinatl client svcs. — Electric shavers.

MindShare Worldwide, New York. Ernie Simon, strategic plng dir. — media svcs.

Commercial Operations North America: Prudential Tower Bldg., Boston, Mass. 02199/Phone: (617) 421-7000. Joseph F. Dooley, pres; James White, VP-bus devel; Richard Meyer, dir-media svcs.

Duracell: 8 Research Dr., Berkshire Corporate Park, Bethel, Conn. 06801/Phone: (203) 769-4000. Mark Leckie, pres.

Acme Idea Co., Norwalk, Conn. Carol Herman, dir-bus devel. — Duracell batteries.

MindShare Worldwide, New York. Ernie Simon, strategic plng dir. — media svcs.

Oral Care Products: Prudential Tower Bldg., Boston, Mass. 02199/Phone: (617) 421-7000. Bruce Cleverly, pres.

Arnold Worldwide, Boston. Jonathan Goldmacher, grp acct dir. — Oral-B dental prods.

BBDO Worldwide, New York. Simon Marlow, exec VP & dir-multinatl client svcs. — Braun oral care appliances.

MindShare Worldwide, New York. Ernie Simon, strategic plng dir. — media svcs.

Personal Care Products: Prudential Tower Bldg., Boston, Mass. 02199/Phone: (617) 421-7000. Mary Ann Pesce, pres.

BBDO Worldwide, New York. Simon Marlow, exec VP & dir-multinatl client svcs. — After shave, Gillette series, Right Guard, Satin Care pre/post shave, preps, Soft & Dri.

MindShare Worldwide, New York. Ernie Simon, strategic plng dir. — media svcs, strategic plng dir.

14 GlaxoSmithKline

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$166,896	\$170,333	-2.0
Sunday magazine	10,740	13,825	-22.3
Newspaper	16,855	17,802	-5.3
National newspaper	5,939	2,645	124.6
Outdoor	2,761	3,268	-15.5
Network TV	291,392	314,026	-7.2
Spot TV	22,023	25,352	-13.1
Syndicated TV	93,676	99,721	-6.1
Cable TV networks	140,383	116,896	20.1
Network radio	3,323	2,212	50.2
National spot radio	4,403	3,888	13.2

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Internet	14,067	3,861	264.3
Business publications	3,447	2,197	56.9
Local magazines	149	161	-7.4
Measured media	776,053	776,187	0.0
Unmeasured media	777,675	777,810	0.0
Total	1,553,728	1,553,997	.0
By brand	2003	2002	% chg
Advair asthma Rx	102,379	109,413	-6.4
Flonase nasal Rx	90,646	78,048	16.1
Imitrex migraine Rx	73,567	71,136	3.4
Valtrex herpes Rx	70,647	46,771	51.0
Paxil anti-depression Rx	61,211	126,669	-51.7
Wellbutrin anti-depression Rx	47,982	5,677	745.2
Tums antacid	44,983	31,894	41.0
Commit nicotine lozenges	41,325	5,613	636.3
Aquafresh toothpaste	32,179	30,996	3.8
Avandia diabetes Rx	30,332	48,453	-37.4
Abreva cold sore treatment	27,558	31,166	-11.6
Nicoderm smoking remedies	25,873	39,414	-34.4
Nicorette smoking remedies	24,932	30,892	-19.3
GlaxoSmithKline pharma	17,648	15,697	12.4
Sensodyne toothpaste	11,579	12,654	-8.5

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$35,275	\$31,379	12.4
Earnings	7,377	5,791	27.4
U.S.	2003	2002	% chg
Sales	15,481	14,493	6.8
U.S. operating income	3,264	3,132	4.2
Division sales	2003	2002	% chg
Pharmaceuticals	29,912	26,620	12.4
Consumer healthcare	5,363	4,759	12.7

Headquarters

GlaxoSmithKline/Glaxo Wellcome House, Berkeley Ave. Greenford, Middlesex, U. K. UB6, ONN/Phone: 44-171-493-4060.

GlaxoSmithKline/5 Moore Dr., P.O. Box 13398, Research Triangle Park, N.C. 27709/Phone: (919) 483-2100.

Personnel, brands, agencies

Corporate: J.P. Garnier, CEO; David Stout, pres-pharmaceutical opers; Chris Viehbacher, pres-U.S. pharmaceutical US Pharmaceuticals.

MPG, New York. Steve Waterman, VP-grp acct dir. — media buying.

GlaxoSmithKline Consumer Healthcare: 100 Beecham Dr., Pittsburgh, Pa. 15205/Phone: (412) 928-1000. Jack Ziegler, pres.

Arnold McGrath, New York, New York. Barry Silverstein, exec VP, grp dir. — Citrucel, Committ, Ecotrin, Gaviscon, Nicoderm CQ, Nicorette, Oxy Balance, Tums.

Grey Healthcare Group, New York. Jane Parker, grp pres-ww adv. — Aquafresh, Contac, Dentu-Crème, Flex toothbrushes, Massengill, Poli-Grip, Polident, Sensodyne, Super Poli-Grip.

Publicis Mid-America, Dallas. Carter Keith, grp acct dir. — BC Analgesics, Bean-O food enzyme supplements, Goody's headache powder, Phazyme gas relief.

MediaCom, New York. Elyse Hoelzer, exec VP, dir-comms plng. — media svcs, Aquafresh, Contac, Geritol, Massengill, Oskal, Poligrip, Polident, Sensodyne, Vivarin, Sominex.

GlaxoSmithKline Pharmaceutical Division: 1 Franklin Plaza, P.O. Box, Pittsburgh, Pa. 15102/Phone: (888) 825-5249. Chris Viehbach, pres-U.S. pharmaceuticals; David Stout, pres-pharmaceutical ops; Bob Ingram, vice chmn-pharmaceuticals.

CommonHealth, Parsippany, N.J. Matt Giegerich, pres & CEO-CommonHealth; David Chapman, pres-Thomas Ferguson Associates; Stuart Klein, pres-The Quantum Group. — Avandamet, Avandia, Levitra (co-marketed with Bayer Healthcare Pharmaceuticals).

Euro RSCG Worldwide, New York. Paul Klein, grp acct dir. — Valtrex, Vesicare.

FCB HealthCare, New York. Tom Domanico, chmn & CEO, ww creative dir; Dana Maiman, pres & CEO. — Havrix, Energix-B, Lamictal, Lamictal-Bipolar, Lactimal-Epilepsy, Augmentin, Infanrix, Twinrix, Valtrex, Wellbutrin.

Grey Healthcare Group, New York. Jane Parker, grp pres-ww adv. — Imitrex, Wellbutrin.

Saatchi & Saatchi, New York. Sam Welch, exec VP-mg dir. — Coreg, Boniva.

MediaCom, New York. Elyse Hoeltzer, exec VP, dir-comms plng. — media svcs, Abreva, Remifemin.

37 Hewlett-Packard Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$142,980	\$106,289	34.5
Sunday magazine	22,202	10,218	117.3
Newspaper	56,397	63,505	-11.2
National newspaper	52,949	51,467	2.9
Outdoor	1,444	461	213.3
Network TV	81,965	56,297	45.6
Spot TV	40,211	4,341	826.4
Syndicated TV	58	1,246	-95.4
Cable TV networks	25,223	33,666	-25.1
National spot radio	2,684	1,714	56.6
Internet	42,309	29,925	41.4
Business publications	42,825	59,520	-28.0
Measured media	511,246	418,648	22.1
Unmeasured media	387,615	317,409	22.1
Total	898,862	736,057	22.1
By brand	2003	2002	% chg
Hewlett-Packard computers	409,324	296,556	38.0
Compaq computers	101,721	121,980	-16.6

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$70,165	\$70,264	-0.1
Earnings	2,539	-928	NA
U.S.	2003	2002	% chg
Sales	29,200	23,302	25.3
Division sales	2003	2002	% chg
Imaging & Printing Group	22,623	21,895	3.3
Personal Systems Group	21,228	21,895	-3.0
Enterprise Systems Group	15,379	16,194	-5.0
HP Services	12,305	12,326	-0.2
Financing	1,921	2,088	-8.0

Headquarters

Hewlett-Packard Co./3000 Hanover St., Palo Alto, Calif. 94304-1185/Phone: (650) 857-1501.

Notes

Hewlett-Packard's full-year returns in its fiscal 2002 ended Oct. 31 include almost six months of Compaq Computer Corp., acquired on May 3, 2002.

Personnel, brands, agencies

Corporate: Carleton S. Fiorina, chmn & CEO; Michael Winkler, exec VP & chief mktg officer; Allison Johnson, sr VP-corp mktg; Gary Elliott, VP-brand mktg; Julia Mee, dir-global brand adv; Scott Berg, ww media plng & buying.

Goodby, Silverstein & Partners, San Francisco. John Coyne, grp acct dir; Dong Kim, assoc media dir; Todd Grantham, account dir-enterprise; Chris Witherspoon, acct dir-cons. — Brand adv, brand media plng, Hewlett-Packard computers.

Publicis & Hal Riney, San Francisco. Scott Mullins, sr VP-grp acct dir. — segment & prod mktg.

ZenithOptimedia, San Francisco. Angelique Vega, sr VP & grp media dir. — media buying.

24 Home Depot

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$47,220	\$35,837	31.8
Sunday magazine	1,391	NA	NA
Newspaper	90,375	79,192	14.1
National newspaper	5,055	6,948	-27.3
Outdoor	2,383	750	217.9
Network TV	152,011	143,275	6.1
Spot TV	32,809	23,875	37.4
Syndicated TV	11,296	6,522	73.2
Cable TV networks	76,573	45,813	67.1
Network radio	1,535	563	173.0
National spot radio	102,523	62,835	63.2
Internet	1,839	202	810.1
Yellow Pages	7,561	6,455	17.1
Spanish-language TV	27,842	19,242	44.7
Business publications	779	497	56.6
Local magazines	76	38	102.9
Measured media	561,266	432,044	29.9
Unmeasured media	588,666	453,136	29.9
Total	1,149,932	885,180	29.9
By brand	2003	2002	% chg
Home Depot stores	539,399	410,879	31.3
Expo design center stores	13,972	13,897	0.5

Sales & earnings (\$ in millions)

Worldwide & U.S.	2003	2002	% chg
Sales	\$64,816	\$58,247	11.3
Earnings	4,304	3,664	17.5

Headquarters

Home Depot/2455 Paces Ferry Rd., N.W., Atlanta, Ga. 30339/Phone: (770) 433-8211.

Personnel, brands, agencies

Corporate: Robert L. Nardelli, chmn, pres & CEO; John Ross, VP-adv; John Costello, exec VP-merch & chief mktg officer.

Richards Group, Dallas. Diane Fannon, principal; Gary Gibson, creative dir.

Initiative Media Worldwide, Atlanta. Robert Claxton, exec VP & gm. — media svcs.

Strategic Print Marketing, Marietta, Ga. Gabriella Austin, VP; Jack Feichtner, acct exec. — media buying-print.

DDB Worldwide Communications, Chicago. Jim Lecinski, acct sr VP & grp acct dir. — direct mktg.

Vidal Partnership, New York. Sandra Alfaro, VP & grp acct dir; Mauricio Galvan, VP & creative dir. — Hispanic adv.

EXPO Design Center Division: 2455 Paces Ferry Rd. N.W., Atlanta, Ga. 30339/Phone: (770) 433-8211. Annette Verschuren, pres.

Richards Group, Dallas. Diane Fannon, principal; Gary Gibson, creative dir.

Ambrosi, Atlanta. Desirae Pierce, acct dir. — creative.

26 Honda Motor Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$118,102	\$134,179	-12.0
Sunday magazine	1,685	2,840	-40.7
Newspaper	15,807	20,773	-23.9
National newspaper	12,120	9,607	26.2
Outdoor	2,651	4,253	-37.7
Network TV	101,353	141,901	-28.6
Spot TV	330,932	305,870	8.2
Syndicated TV	10,305	14,478	-28.8
Cable TV networks	87,657	74,040	18.4
Network radio	650	192	238.6
National spot radio	211	657	-67.8
Internet	7,302	11,423	-36.1
Spanish-language TV	19,141	17,991	6.4
Business publications	1,055	1,159	-8.9
Local magazines	NA	8	NA
Measured media	708,971	739,372	-4.1
Unmeasured media	434,755	453,397	-4.1
Total	1,143,725	1,192,769	-4.1
By brand	2003	2002	% chg
Honda vehicles	486,619	530,273	-8.2
Acura vehicles	221,930	208,702	6.3

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$72,261	\$65,428	10.4
Earnings	4,111	3,502	17.4
North America	2003	2002	% chg
Sales	40,306	37,592	7.2
Operating income	2,746	3,647	-24.7
Division sales	2003	2002	% chg
Automotive	58,357	52,859	10.4
Motorcycles	8,820	8,028	9.9
Power products & other	2,936	2,588	13.4
Financial svcs	2,148	1,953	10.0

Headquarters

Honda Motor Co./1-1, 2-chome, Minami-Aoyama, Minato-ku, Tokyo, Japan 107-8556/Phone: 81-3-3423-1111.

Honda Motor Co./American Honda Motor Co., 1919 Torrance Blvd., Torrance, Calif. 90501-2746/Phone: (310) 783-2000.

Notes

Exchange rates used are averages for 12 months ending March 31 of year. 2003: 0.008215. 2002: 0.008008.

Personnel, brands, agencies

Corporate: Takeo Fukui, pres & CEO-Honda Motor Co.; Koichi Kondo, pres & CEO-American Honda Motor Co.; Eric Conn, asst VP-natl auto adv; Rob Alen, mgr-corp adv.

RPA, Santa Monica, Calif. Bill Hagelstein, exec VP.

Acura Division: 1919 Torrance Blvd., Torrance, Calif. 90501-2746/Phone: (310) 783-2000. Richard Colliver, exec VP-sls; Steven Center, asst VP-sls; Susie Rossick, mgr-natl adv.

RPA, Santa Monica, Calif. Bill Hagelstein, exec VP; Joan Egan, VP & grp acct dir. — Acura vehicles.

La Agencia de Orci & Asociados, Los Angeles. Jaime Ramirez, dir-client svcs. — Hispanic adv.

Honda Division: 1919 Torrance Blvd., Torrance, Calif. 90501-2746/Phone: (310) 783-2000. Richard Colliver, exec VP-sls; Richard Szamborski, asst VP-sls; Tom Peyton, mgr-natl adv.

RPA, Santa Monica, Calif. Bill Hagelstein, exec VP; Chuck Valentine, sr VP & grp acct dir. — Honda vehicles.

La Agencia de Orci & Asociados, Los Angeles. Jaime Ramirez, dir-client svcs. — Hispanic adv.

Muse Codero Chen & Partners, Los Angeles. Joe Muse, VP-client svcs. — African-American adv.

Honda Power Equipment: 4900 Marconi Dr., Alpharetta, Ga. 30005/Phone: (678) 339-2600. Akira Imai, VP; Wade Terry, VP; John Lally, mgr-natl adv.

Frank Best International, Nashville, Tenn. Bobby Frank, pres & gm; Gunnar Eng, VP-client svcs.

Motorcycle Division: 1919 Torrance Blvd., Torrance, Calif. 90501-2746/Phone: (310) 783-2000. Raymond Blank, VP; Wayne Toyota, sr mgr-motorcycle adv & promo.

Dailey & Associates, Los Angeles. Steve Mitchell, sr VP & mg super. — Honda motorcycles, all terrain vehicles, personal watercraft, Honda Riders' Club of America.

96 Hyundai Motor Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$16,100	\$27,176	-40.8
Newspaper	2,327	1,059	119.7
National newspaper	1,692	309	446.8
Outdoor	658	791	-16.8
Network TV	48,239	38,005	26.9
Spot TV	121,031	69,104	75.1
Syndicated TV	4,867	761	539.4
Cable TV networks	26,818	22,051	21.6
National spot radio	390	353	10.5
Internet	1,707	1,928	-11.5
Spanish-language TV	15,142	16,601	-8.8
Business publications	660	699	-5.7
Measured media	239,630	178,838	34.0
Unmeasured media	93,189	69,548	34.0
Total	332,820	248,386	34.0
By brand	2003	2002	% chg
Hyundai vehicles	239,630	178,838	34.0

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$20,950	\$20,914	0.2
Earnings	1,468	1,146	28.1

Headquarters

Hyundai Motor Co./231 Yangjai-dong, Seocho-gu, Seoul, South Korea /Phone: 82-2-3464-1114.

Hyundai Motor Co./Hyundai Motor America, 10550 Talbert Ave., Fountain Valley, Calif. 92728/Phone: (714) 965-3000.

Notes

Hyundai owns 37% of Kia Motors Corp., another 100 Leading National Advertiser company.

Personnel, brands, agencies

Corporate: Mong-Koo Chung, chmn & CEO; Dong-Jin Kim, pres.

Hyundai Motor America: 10550 Talbert Ave., Fountain Valley, Calif. 92728/Phone: (714) 965-3000. Robert Cosmai, pres & CEO; Ed Bradley, VP-natl sls; Paul Sellers, exec dir-mktg.

Richards Group, Dallas. Dale Hruby, principal. — Hyundai vehicles.

Carat North America, Los Angeles. Tom Somerset, sr VP & grp acct dir. — media svcs.

38 IBM Corp.**U.S. ad spending (\$ in thousands)**

By media	2003	2002	% chg
Magazine	\$100,986	\$79,601	26.9
Sunday magazine	1,627	1,381	17.8
Newspaper	15,643	20,327	-23.0
National newspaper	57,028	66,566	-14.3
Outdoor	4,305	2,539	69.6
Network TV	110,438	90,844	21.6
Spot TV	168	280	-39.9
Syndicated TV	9,013	6,672	35.1
Cable TV networks	33,900	51,672	-34.4
National spot radio	497	177	180.9
Internet	12,065	12,869	-6.2
Business publications	82,169	80,134	2.5
Local magazines	NA	1	NA
Measured media	427,837	413,061	3.6
Unmeasured media	434,212	419,217	3.6
Total	862,049	832,278	3.6
By brand	2003	2002	% chg
IBM computers & services ..	423,110	397,104	6.5

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$89,131	\$81,186	9.8
Earnings	7,583	3,579	111.9
U.S.	2003	2002	% chg
Sales	33,762	32,759	3.1
U.S. operations (before taxes) ..	4,611	3,838	20.1
Division sales	2003	2002	% chg
Global Services	42,635	36,360	17.3
Hardware	28,239	27,456	2.9
Software	14,311	13,074	9.5
Global Financing	2,826	3,232	-12.6
Enterprise Investments	1,120	1,064	5.3

Headquarters

IBM Corp./New Orchard Rd., Armonk, N.Y. 10504/Phone: (914) 499-1900.

Personnel, brands, agencies

Corporate: Sam Palmisano, chmn & CEO; Abby Kohnstamm, sr VP-mktg; Lisa Baird, VP-ww integrated mktg comms; Deidre Bigley, VP-ww adv.

IBM Direct Marketing: 1133 Westchester Ave., White Plains, N.Y. 10604/Phone: (800) 426-4968. Diane Brink, VP-mktg, Americas; Sergio Restrepo, VP-Americas integrated mktg comms.

OgilvyOne Worldwide, New York. Carla Hendra, pres-OgilvyOne N. Amer.; Bruce Lee, sr ptnr & exec creative dir. — Software, servers, services, ww strategy, N. Amer. Execution, global direct mktg.

IBM Global Services: Route 100, Somers, N.Y. 10589/Phone: (914) 766-1900. John R. Joyce, sr VP & grp exec; Maureen McGuire, VP-mktg & strategy; Mary Garrett, VP-mktg; Mark Rosen, VP-integrated mktg comms.

Ogilvy & Mather Worldwide, New York. Tim Eldridge, exec grp dir.

IBM Personal Computing Group: Route 100, Somers, N.Y. 10589/Phone: (914) 766-1900. Steve Ward, sr VP & grp exec; Deepak Advani, VP-mktg & strategy-PCD; Josh Shapiro, VP-integrated mktg comms.

Ogilvy & Mather Worldwide, New York. Lou Aversano, exec grp dir. — adv & media svcs.

IBM Server Systems: Route 100, Somers, N.Y. 10589/Phone: (914) 766-1900. William Zeitler, sr VP & grp exec; Mark Shearer, VP-mktg & strategy; Nancy Roath, VP-integrated mktg comms, eServer.

Ogilvy & Mather Worldwide, New York. Sally Kissane, adv dir. — IBM eServer pSeries, xSeries, iSeries, zSeries.

R/GA, New York. John Antinori, exec producer. — interactive mktg.

ibm.com: 1133 Westchester Ave., White Plains, N.Y. 10604/Phone: (914) 766-1900. Rich Fennessy, gm; Curt Gillespie, VP-mktg & sales programs.

AnswerThink, New York. Mark Fithian, acct dir. — Interactive adv.

Modem Media, Norwalk, Conn. Rob Powers, VP & grp acct dir. — Interactive adv.

Ogilvy & Mather Interactive, New York. Carla Hendra, pres-OgilvyOne, OgilvyInteractive. — Interactive adv.

R/GA, New York. John Antinori, exec producer. — interactive mktg.

Software Group: Route 100, Somers, N.Y. 10589/Phone: (914) 766-1900. Steve Mills, sr VP & grp exec; Marc Dupaquier, VP-mktg; Ann Rubin, dir-integrated mktg comms.

Ogilvy & Mather Worldwide, New York. Robert Swartz, grp acct dir. — DB2, developerWorks, WebSphere, Lotus, Tivoli.

R/GA, New York. John Antinori, exec producer. — interactive mktg.

86 Intel Corp.**U.S. ad spending (\$ in thousands)**

By media	2003	2002	% chg
Magazine	\$28,761	\$15,794	82.1
Sunday magazine	1,410	NA	NA
Newspaper	206	362	-43.2

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
National newspaper	19,185	12,885	48.9
Outdoor	1,935	1,302	48.7
Network TV	46,634	49,714	-6.2
Spot TV	2,647	2,775	-4.6
Syndicated TV	780	2,213	-64.8
Cable TV networks	14,114	12,317	14.6
National spot radio	156	49	218.2
Internet	2,897	3,886	-25.5
Business publications	12,418	13,655	-9.1
Measured media	131,141	114,950	14.1
Unmeasured media	262,678	230,248	14.1
Total	393,819	345,198	14.1
By brand	2003	2002	% chg
Intel processors	131,112	114,703	14.3

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$30,141	\$26,764	12.6
Earnings	5,641	3,117	81.0
U.S.	2003	2002	% chg
Sales	7,644	7,698	-0.7
U.S. pre-tax income	1,737	2,165	-19.8
Division sales	2003	2002	% chg
Intel Architecture Business	26,102	22,316	17.0
Intel Communications Group	2,147	2,080	3.2
Wireless Comms & Computing	1,857	2,239	-17.1
Other	35	129	-72.9

Headquarters

Intel Corp./2200 Mission College Blvd., P.O. Box 58119, Santa Clara, Calif. 95052-8119/Phone: (408) 765-8080.

Personnel, brands, agencies

Corporate: Craig R. Barrett, CEO; Paul Otellini, pres & chief operating officer; Pam Pollace, VP & dir-corp comms; Don Macdonald, VP & dir-www branding & campaigns; Sean Connolly, mg-www adv.

Euro RSCG MVBMS Partners, New York. George Gallate, global dir-Euro RSCG 4D & global brand dir-Intel; Michael Kantrow, ptrn & mg dir; Susan Chung, grp acct dir. — Intel Centrino mobile technology, Intel Pentium 4 processor with Hyper-threading technology, Intel Itanium processor, Intel Xeon processor, Intel Inside.

MPG, New York. Steve Lanzano, exec VP-mg dir. — media svcs.

72 InterActiveCorp**U.S. ad spending (\$ in thousands)**

By media	2003	2002	% chg
Magazine	\$22,422	\$20,226	10.9
Sunday magazine	741	51	NA
Newspaper	2,268	1,299	74.6
National newspaper	2,907	1,512	92.3
Outdoor	1,952	30	NA
Network TV	45,728	21,738	110.4
Spot TV	30,475	4,051	652.3
Syndicated TV	31,200	344	NA
Cable TV networks	78,152	56,099	39.3
Network radio	23,563	29,403	-19.9
National spot radio	5,264	9,298	-43.4
Internet	77,161	51,358	50.2

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Business publications	510	104	391.9
Local magazines	19	61	-68.7
Measured media	322,360	195,572	64.8
Unmeasured media	138,578	84,074	64.8
Total	460,938	279,646	64.8
By brand	2003	2002	% chg
Expedia.com travel	114,990	54,969	109.2
Lendingtree.com fin svcs	65,175	41,641	56.5
Hotels.com	53,986	25,356	112.9
Match.com dating svc	45,882	32,253	42.3
Hotwire online travel svc	26,390	27,088	-2.6

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$6,328	\$4,581	38.1
Earnings	154	1,941	-92.1
U.S.	2003	2002	% chg
Sales	5,227	3,973	31.6
Division sales	2003	2002	% chg
IAC Travel	2,610	1,563	67.0
Electronic Retailing	2,230	1,922	16.0
Ticketing	743	655	13.4
IAC Local Services	230	31	641.9
Personals	185	126	46.8
Financial Services & Real Estate	55	0	NA

Headquarters

InterActiveCorp/152 W. 57th St., 42nd fl., New York, N.Y. 10019/Phone: (212) 314-7300.

Personnel, brands, agencies

Corporate: Barry Diller, chmn & CEO; Victor Kaufman, vice chmn; Julius Genachowski, exec VP & chief-bus ops.

Citysearch: 3731 Wilshire Blvd., Ste. 300, Los Angeles, Calif. 90010/Phone: (213) 739-3200. Briggs Ferguson, CEO; Pat Quigley, exec VP-sls & mktg.

In-house.

Entertainment Publications: 1414 East Maple Rd., Troy, Mich. 48083/Phone: (248) 637-8400. Alan Bittker, pres & CEO; Yosi Hebr, chief mktg officer.

No agency.

Evite: 3731 Wilshire Blvd., Ste. 300, Los Angeles, Calif. 90010/Phone: (310) 360-2600. John Foley, pres; Stacey Smith, dir-mktg & sls.

In-house.

Expedia: 13810 SE Eastgate Way, Ste. 400, Bellevue, Wash. 98005/Phone: (425) 564-7200. Erik C. Blachford, pres & CEO; Stuart MacDonald, sr VP-mktg & packages; Sarah Makar, VP-mktg.

Deutsch, Los Angeles. Eric Koehler, acct dir.

Hotels.com: 10440 N. Central Expressway, Ste. 400, Dallas, Texas 75231/Phone: (214) 361-7311. Cheryl Rosner, pres; Carl Minto-Sparks, sr VP-mktg.

Doner, Detroit. Kevin Weinman, exec VP & acct dir. — print & broadcast adv.

Avenue A, Chicago. Kristie Frankland, acct dir. — online adv.

Hotwire: 333 Market St., Ste. 100, San Francisco, Calif. 94105/Phone: (415) 343-8400. Karl Peterson, pres & CEO; Ty Shay, chief mktg officer.

McCann Erickson, San Francisco. Frank Dibiasi, sr VP-acct dir.

Universal McCann Worldwide, San Francisco. Karen Polsky, sr VP-mg dir. — media svcs.

HSN: 1 HSN Drive, St. Petersburg, Fla. 33729/Phone: (727) 872-1000. Thomas J. McInerney, CEO-HSN & electronic retailing; Marty Nealon, pres-HSN U.S.

No agency.

Interval International: 6262 Sunset Dr., Miami, Fla. 33243/Phone: (305) 666-1884. Craig M. Nash, chmn & CEO; Dave Gilbert, exec VP-sls & mktg.

Yesawich, Peppardine, Brown & Russell, Orlando. John Fareed, VP-mgmt super.

LendingTree: 1115 Rushmore Dr., Charlotte, N.C. 28277/Phone: (704) 541-5351. Douglas R. Lebda, founder & CEO; Thomas J. Reddin, pres & chief operating officer; Robert Harris, chief mktg officer.

Mullen, Wenham, Mass. Edward Christopher, VP-acct dir.

Match.com: 3001 George Bush Highway, Ste. 100, Richardson, Texas 75082/Phone: (214) 576-9352. Tim Sullivan, pres; Melanie Angermann, vp-mktg.

Launch Agency, Dallas. Diane Seimetz, principal; David Wilgus, principal; Michael Boone, principal.

Mullen, Wenham, Mass. John Moore, sr VP-grp media dir. — media svcs.

Reserve America: 40 South Street, Ballston Spa, N.Y. 12020/Phone: (800) 695-4636. Brock Weatherup, pres & COO; John McDonald, mgr-cons mktg, prods & comms.

In-house.

Ticketmaster: 8800 Sunset Blvd., West Hollywood, Calif. 90069/Phone: (213) 639-6100. Terry R. Barnes, chmn; John Pleasance, CEO & pres; Calvin Lui, VP-sls & mktg.

No agency.

TripAdvisor: 464 Hillside Ave., Ste. 304, Needham, Mass. 02494/Phone: (781) 444-1113. Langley Steinert, chmn; Stephen Kaufer, pres & CEO.

In-house.

8 Johnson & Johnson

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$306,867	\$257,188	19.3
Sunday magazine	16,944	13,521	25.3
Newspaper	2,838	5,322	-46.7
National newspaper	3,552	4,060	-12.5
Outdoor	797	995	-20.0
Network TV	527,507	508,474	3.7
Spot TV	38,656	51,999	-25.7
Syndicated TV	101,468	66,600	52.4
Cable TV networks	164,311	145,134	13.2
Network radio	15,770	10,731	47.0

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
National spot radio	7,166	8,938	-19.8
Internet	11,886	9,062	31.2
Spanish-language TV	49,883	42,347	17.8
Business publications	4,286	4,185	2.4
Local magazines	0	23	NA
Measured media	1,251,930	1,128,578	10.9
Unmeasured media	743,753	670,471	10.9
Total	1,995,683	1,799,049	10.9
By brand	2003	2002	% chg
Tylenol pain remedies	209,264	134,103	56.0
Neutrogena skin care prods	162,847	153,359	6.2
Ortho pharmaceuticals	86,569	75,400	14.8
Aveeno skin care products	86,184	61,632	39.8
Procrit anemia Rx	76,872	76,508	0.5
Johnson & Johnson corporate	73,445	65,706	11.8
Pepcid heartburn remedies	58,436	57,350	1.9
Motrin pain remedies	46,347	30,077	54.1
Acuvue contact lenses	43,060	49,277	-12.6
Band-Aid bandages	31,776	24,717	28.6
Imodium AD anti-diarrheal Rx	29,983	21,297	40.8
OneTouch glucose mtrg prods	29,243	29,279	-0.1
Clean & Clear skin products	28,750	29,166	-1.4
Concerta ADHD trtmt Rx	25,174	5,412	365.1
Splenda sweetener	22,653	13,187	71.8
Remicade arthritis Rx	22,118	3,663	503.8
St. Joseph pain remedies	21,754	21,170	2.8
Monistat yeast cream	19,587	23,615	-17.1
Retin-A acne Rx	17,557	13,132	33.7
Stayfree feminine products	17,340	18,988	-8.7
Reach dental products	15,960	15,827	0.8
Lactaid digestive aids	15,823	18,368	-13.9
Mylanta antacid	14,778	16,721	-11.6
RoC skin care products	12,901	24,692	-47.8
Viactiv energy bars	11,271	17,711	-36.4
Carefree feminine products	10,910	7,736	41.0

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$41,862	\$36,298	15.3
Earnings	7,197	6,597	9.1
U.S.	2003	2002	% chg
Sales	25,274	22,455	12.6
Division sales	2003	2002	% chg
Pharmaceutical	19,517	17,151	13.8
Medical devices & diagnostics	14,914	12,583	18.5
Consumer	7,431	6,564	13.2

Headquarters

Johnson & Johnson/1 Johnson & Johnson Plaza, New Brunswick, N.J. 08933/Phone: (732) 524-0400.

Personnel, brands, agencies

Corporate: William C. Weldon, chmn & CEO; J. Andrea Alstrup, VP-adv; Dawn Jacobs, VP-adv.

McCann Erickson Worldwide, New York. Claire Roundal, exec VP & grp mg dir.

Universal McCann Worldwide, New York. Peggy Kelly, exec VP-global client svcs dir. — media svcs.

OMD Worldwide, New York. Chris Hoopes, acct dir; Ginger Taylor White, acct dir. — media buying.

Centocor: 200 Great Valley Pkwy., Malvern, Pa. 19355/Phone: (610) 651-6000. Tony Vernon, pres; Scott Habig, VP-sls & mktg.

CommonHealth, Parsippany, N.J. Matt Giegerich, pres & CEO; David Chapman, pres-Thomas Ferguson Associates (a CommonHealth co.). — oncology franchise (prof).

Nelson Communications Worldwide, New York. Fred Kellogg, chmn & CEO. — Remicade arthritis Rx.

OgilvyOne Worldwide, New York. Allison Womack, sr ptnr & client svcs dir-healthcare. — direct mktg.

DePuy: 700 Orthopaedic Dr., Warsaw, Ind. 46581-0988/Phone: (574) 267-8143. Kevin K. Sidow, ww pres; Eric Dremel, VP-sls.

CommonHealth, Parsippany, N.J. Matt Giegerich, pres & CEO; David Chapman, pres-Thomas Ferguson Associates (a CommonHealth co.). — Codman 3000 & Archimedes implantable pumps (prof).

DDB Worldwide Communications, New York. Gord Desveaux, exec VP & dir-strategic plng. — Codman, DePuy Orthopaedics.

Ethicon: Route 22 West, Somerville, N.J. 08876/Phone: (908) 218-0707. Rodrigo Bianchi, ww pres-Ethicon Products; Robert Coradini, ww pres-Cardiovations; Dan Wildman, ww pres-J&J Wound Management; Barbara Schwartz, ww pres-Gynecare.

Harrington Group, Morristown, N.J. Kevin Harrington, pres. — Dermabond.

Regan Campbell Ward, New York. Maureen Regan, mg ptnr. — Sutures, Thermachoice, VT.

J&J/Merck Consumer Pharmaceuticals Co.: 7050 Camp Hill Rd., Ft. Washington, Pa. 19034-2292/Phone: (215) 233-7700. Renaat Van den Hooff, ww pres.

Alchemy, New York. Rich Pounder, pres. — Mylanta, Mylicon, Mevacor, Pepcid.

Conill, New York. Carla Poumian-Ruiz, acct dir. — Hispanic adv, Mylanta, Pepcid.

Janssen Pharmaceutica Products: 1125 Trenton-Harbourton Rd., Titusville, N.J. 08560-0200/Phone: (609) 730-2000. Peter Miller, pres; John Buckingham, VP-corp devel.

KPR, New York. Marcia McLaughlin, mg dir; Michael Metelenis, mg dir. — Duragesic, Risperdal.

Torre Lazur McCann Healthcare Worldwide, Parsippany, N.J. Beverly Breitenbach, exec VP. — Aciphex.

Johnson & Johnson Consumer Products Co.: 199 Grandview Rd., Skillman, N.J. 08558/Phone: (908) 874-1000. Colleen Goggins, ww chmn-cons & personal care grp; Sharon D'Agostino, global pres-skincare; Sherilyn McCoy, pres-baby/kids & wound care.

DDB Worldwide Communications, New York & Chicago. Ben Arno, grp acct dir. — Aveeno, Clean & Clear, Purpose, RoC, Shower to Shower.

Lowe & Partners Worldwide, New York. Peter Leinroth, exec VP & ww client dir. — Johnson's Baby Products.

McCann Erickson Worldwide, New York. Claire Roundal, exec VP & grp mg dir. — Band-Aid bandages.

Casanova Pendrill Publicidad, Costa Mesa, Calif. Allen Payano, acct dir. — Hispanic adv, Band-Aid bandages, Johnson's Baby Products.

Del Rivero Messianu DDB, Coral Gables, Fla. Eduardo del Rivero, CEO. — Hispanic adv, Clean & Clear.

Tribal DDB, New York. Matt Freeman, CEO-N. Amer. — inter-active mktg, Clean & Clear.

LifeScan: 1000 Gibraltar Dr., Milpitas, Calif. 95035/Phone: (408) 263-9789. Eric Milledge, grp chmn; Peter Luther, pres; Eric Compton, VP-mktg.

DDB Worldwide Communications, New York. Gord Desveaux, exec VP & dir-strat plng. — OneTouch diabetes testing prods.

McNeil Consumer & Specialty Pharmaceuticals/Nutritionals Worldwide: 7050 Camp Hill Rd., Fort Washington, Pa. 19034-2210/Phone: (215) 273-7000. William L. McComb, pres-Consumer & Specialty Pharmaceuticals; Colin Watts, pres-Nutritionals; Ashley McEvoy, VP-mktg; Brenda S. Bass, VP-sls.

Alchemy, New York. Rich Pounder, pres. — Benecol, Imodium, Lactaid, Motrin, Simply Stuff, Simply Cough, Splenda, Viactiv.

Deutsch, New York. Val DiFebo, mg ptnr & gm. — St. Joseph aspirin, Tylenol prods.

Conill, New York. Carla Poumian-Ruiz, acct dir. — Hispanic adv, Imodium, Motrin, Tylenol.

Neutrogena Corp.: 5760 W. 96th St., Los Angeles, Calif. 90045/Phone: (310) 642-1150. Jan Hall, pres-N. Amer.; Anne Sawbridge, VP-mktg.

DDB Worldwide Communications, New York & Chicago. Ben Arno, grp acct dir. — Neutrogena skin care prods.

Del Rivero Messianu DDB, Coral Gables, Fla. Eduardo del Rivero, CEO. — Hispanic adv.

Tribal DDB, New York. Matt Freeman, CEO-N. Amer. — inter-active mktg.

Ortho Biotech Products: 430 Route #22 East, P.O. Box 6914, Bridgewater, N.J. 08807-0914/Phone: (908) 541-4000. Carol A. Webb, grp chmn; John Johnson, pres; John Bacci, VP-bus & new prod devel.

CommonHealth, Parsippany, N.J. Matt Giegerich, pres & CEO; David Chapman, pres-Thomas Ferguson Associates (a CommonHealth co.). — prof: Eprex, Leustatin, Procrit, Sporanox IV.

DDB Worldwide Communications, New York. Gord Desveaux, exec VP & dir-strat plng. — Procrit anemia Rx.

OgilvyOne Worldwide, New York. Allison Womack, sr ptnr & client svcs dir-healthcare. — direct mktg.

Ortho-McNeil Pharmaceutical: 1000 Route #202 South, Raritan, N.J. 08869/Phone: (908) 218-6000. Seth Fischer, pres.

Alchemy, New York. Rich Pounder, pres. — Ortho Tri-Cyclen Lo, Ortho Evra, Ditropan XL, Topamax, Elmiron, Ultracet.

CommonHealth, Wayne & Parsippany, N.J. Matt Giegerich, pres & CEO; Guy Dess, pres-Adient (a CommonHealth co.); David Chapman, pres-Thomas Ferguson Associates (a CommonHealth co.). — prof: Levaquin, Levaquin IV, Topamax.

Casanova Pendrill Publicidad, Costa Mesa, Calif. Caroline Buenrostro, acct exec; Fernando Garcia, acct dir. — Hispanic adv, Ortho Evra.

Personal Products Co.: 199 Grandview Rd., Skillman, N.J. 08558-9418/Phone: (908) 874-1000. Michael Sneed, pres; Naomi Kelman, VP-mktg.

Lowe & Partners Worldwide, New York. Peter Leinroth, exec VP & ww client dir.

McCann Erickson Worldwide, New York. Claire Roundal, exec VP & grp mg dir. — K-Y lubricants, Monistat, Reach dental prods.

Vistakon: 7500 Centurion Pkwy., Jacksonville, Fla. 32256/Phone: (904) 443-1000. Don Casey, grp pres; Peter Valenti, VP-U.S. mktg.

McCann Erickson Worldwide, New York. Claire Roundal, exec VP & grp mg dir. — Acuvue contact lenses.

99 SC Johnson

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$25,129	\$16,009	57.0
Sunday magazine	4,392	1,892	132.1
Newspaper	46	1	NA
National newspaper	NA	85	NA
Outdoor	NA	10	NA
Network TV	153,609	165,502	-7.2
Spot TV	16,156	16,002	1.0
Syndicated TV	20,967	42,091	-50.2
Cable TV networks	46,638	47,879	-2.6
National spot radio	606	560	8.3
Internet	1	118	-99.4
Spanish-language TV	5,300	2,424	118.7
Business publications	518	143	261.4
Measured media	273,360	292,717	-6.6
Unmeasured media	44,828	48,002	-6.6
Total	318,188	340,719	-6.6

By brand	2003	2002	% chg
Glade air fresheners	58,735	53,659	9.5
Pledge furniture polish	36,274	43,861	-17.3
Oust air sanitizer	32,639	528	6083.1
Ziploc storage bags	28,226	29,135	-3.1
Windex glass cleaner	27,481	26,343	4.3
Skintimate shaving gel	14,269	8,728	63.5
Off bug repellent	11,862	19,951	-40.5
SC Johnson corporate	11,248	13,821	-18.6
Shout stain remover	11,067	23,209	-52.3

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$5,370	\$5,000	7.4

Headquarters

SC Johnson/1525 Howe St., Racine, Wis. 53403/Phone: (262) 260-2000.

Personnel, brands, agencies

Corporate: Dr. H. Fisk Johnson, chmn; William D. Perez, pres & CEO; David L. May, pres-N. Amer.; Ralph D. Perry, VP-air care & Canadian ops; Greg Barron, VP-new prods, N. Amer.; Pat Penman, dir-mktg svcs; Kelley Rich, category mgr; Miguel A. de Garcia, gm-Puerto Rico & Caribbean; Stephane Reverdy, global sales dir & American region sales dir.

Footie, Cone & Belding Worldwide, Chicago. Mark Pacchini, exec VP-ww grp acct dir & pres; Mark Modesto, exec VP-ww grp acct dir & pres. — Drano, Edge, Fantastik, Glade, Grab-It, OFF!, Oust, Pledge, Raid, Saran Wrap, Scrubbing Bubbles, Shout, Skintimate, Vanish, Windex, Ziploc.

Initiative Media North America, New York. Larry Orell, exec VP & gm. — media buying.

R/GA, New York. Dawn Winchester, VP-client svcs. — interactive & relationship mktg, new prods & cons awareness.

57 Kellogg Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$83,363	\$37,805	120.5
Sunday magazine	8,925	4,040	120.9
Newspaper	1,310	376	248.5
National newspaper	0	72	NA

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Outdoor	458	233	96.9
Network TV	95,894	85,069	12.7
Spot TV	12,634	25,349	-50.2
Syndicated TV	48,009	43,088	11.4
Cable TV networks	92,766	63,496	46.1
Network radio	1,206	829	45.3
National spot radio	2,157	5,229	-58.7
Internet	4,557	2,047	122.6
Spanish-language TV	20,468	12,072	69.6
Business publications	2,305	2,045	12.7
Local magazines	18	NA	NA
Measured media	374,069	281,750	32.8
Unmeasured media	195,623	147,344	32.8
Total	569,692	429,094	32.8

By brand	2003	2002	% chg
Kelloggs cereals	281,032	231,004	21.7
Keebler cookies & crackers	36,294	21,598	68.0
Sunshine Cheez-It crackers	23,870	12,248	94.9
Kashi cereals	15,940	7,759	105.4
Eggo frozen waffles	15,927	8,648	84.2

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$8,812	\$8,304	6.1
Earnings	787	721	9.2

U.S.	2003	2002	% chg
Sales	5,629	5,525	1.9
Operating profit	1,055	1,073	-1.7

Division sales	2003	2002	% chg
United States	5,629	5,525	1.9
Europe	1,734	1,470	18.0
Latin America	646	631	2.4
Other	802	678	18.3

Headquarters

Kellogg Co./1 Kellogg Square, P.O. Box 3599, Battle Creek, Mich. 49016/Phone: (269) 961-2000.

Personnel, brands, agencies

Corporate: Carlos Gutierrez, CEO; David A. Mackay, pres-Kellogg USA; Alan Harris, exec VP-chief mktg & customer officer.

Kellogg Snacks Division: 1 Kellogg Square, Battle Creek, Mich. 49016/Phone: (616) 961-2000. Brad Davidson, pres; Tim Goaley, sr VP-ops.

Leo Burnett Worldwide, Chicago. Clive Sirkin, exec VP & grp mg dir; John Sheehy, exec VP & acct dir. — Keebler cookies & crackers, Nutri-Grain cereal bars, Rice Krispie Treats, Cheez-It, Special K Bars, Cereal and Milk Bars.

Starcom, Chicago. Ken Taylor, media dir. — media svcs.

Morning Foods Division: 1 Kellogg Square, Battle Creek, Mich. 49016/Phone: (616) 961-2000. Paul Norman, pres; Mark Baynes, VP-mktg.

Leo Burnett Worldwide, Chicago. Clive Sirkin, exec VP & grp mg dir; John Sheehy, exec VP & acct dir. — All Bran cereals, Apple Jacks, Banana Corn Flakes, Cocoa Rice Krispies, Corn Flakes, Corn Pops, Cracklin' Oat Bran, Crispix, Disney Cereals, Disney Fruit Snacks, Froot Loops, Frosted Flakes, Fruit Harvest Cereal, Krave Bars, Maple and Brown Sugar Mini-Wheats, Mini-

Wheats, Pop-tarts, Raisin Bran Crunch, Rice Krispies, Smart Start, Special K, Special K Red Berries, Special K Vanilla Almond, Special K for a Low Carb Lifestyle, Scooby Doo, Smorz, Spongebob, Tony's Cinnamon Crunchers, Twistables.

Starcom, Chicago. Ken Taylor, media dir. — media svcs.

Lapiz Integrated Hispanic Marketing, Chicago. Dolores Kunda, pres & CEO. — Hispanic adv.

Wimbley Group, Itasca, Ill. Charles Wimbley, Sr., pres. — African-American adv.

Natural & Frozen Foods Division: 1 Kellogg Square, Battle Creek, Mich. 49016/Phone: (616) 961-2000. Tony Palmer, pres.

Leo Burnett Worldwide, Chicago. Clive Sirkin, exec VP & grp mg dir; John Sheehy, exec VP & acct dir. — Eggo waffles.

Starcom, Chicago. Ken Taylor, media dir. — media svcs.

Lapiz Integrated Hispanic Marketing, Chicago. Dolores Kunda, pres & CEO. — Hispanic adv.

92 Kia Motors Corp.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$36,045	\$23,611	52.7
Newspaper	7,464	89	NA
National newspaper	181	1,456	-87.6
Outdoor	1,084	452	139.9
Network TV	94,771	105,733	-10.4
Spot TV	25,164	65,062	-61.3
Syndicated TV	15,144	7,311	107.1
Cable TV networks	58,078	40,226	44.4
Network radio	2,124	NA	NA
National spot radio	NA	40	NA
Internet	1,252	155	709.5
Spanish-language TV	8,631	7,065	22.2
Business publications	90	97	-7.3
Measured media	250,027	251,298	-0.5
Unmeasured media	97,233	97,727	-0.5
Total	347,260	349,024	-0.5
By brand	2003	2002	% chg
Kia vehicles	250,027	251,298	-0.5

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$10,774	\$9,655	11.6
Earnings	592	509	16.3
North America	2003	2002	% chg
Sales	3,131	2,656	17.9

Headquarters

Kia Motors Corp./231 Yangjae-dong, Seocho-gu, Seoul, South Korea /Phone: 82-2-3464-1114.

Kia Motors Corp./Kia Motors America, 9801 Muirlands Blvd., Irvine, Calif. 92619-2410/Phone: (949) 470-7000.

Notes

Kia is 37% owned by Hyundai Motor Co., another 100 Leading National Advertiser company. The creative portion of Kia's advertising account went into review early this month, with incumbent davidandgoliath, Irvine, Calif., defending the account.

Personnel, brands, agencies

Corporate: Mong-Koo Chung, chmn; Guk-Jin Yoon, pres & CEO.

Kia Motors America: 9801 Muirlands Blvd., Irvine, Calif. 92619-2410/Phone: (949) 470-7000. Peter M. Butterfield, pres & CEO; Walter Anderson, VP-mktg; Phil Kelley, VP-sls; Thomas Smith, dir-mktg.

davidandgoliath, Los Angeles. Mike Dillon, acct dir. — Kia vehicles.

World Marketing Group, Irvine, Calif. Robyn D. Simburger, dir-media svcs. — media svcs.

91 Kimberly-Clark Corp.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$79,014	\$75,704	4.4
Sunday magazine	7,423	2,581	187.7
Newspaper	46	766	-94.0
National newspaper	NA	723	NA
Network TV	88,547	110,316	-19.7
Spot TV	9,976	12,582	-20.7
Syndicated TV	3,510	2,048	71.4
Cable TV networks	43,360	36,001	20.4
Network radio	3,758	1,747	115.1
National spot radio	99	43	127.2
Internet	7,476	5,465	36.8
Spanish-language TV	8,334	7,139	16.7
Business publications	375	349	7.4
Measured media	251,918	255,464	-1.4
Unmeasured media	95,655	97,002	-1.4
Total	347,573	352,466	-1.4
By brand	2003	2002	% chg
Huggies disposable diapers	68,499	62,637	9.4
Kleenex facial tissue	39,163	42,530	-7.9
Cottonelle bathroom tissue	36,554	37,230	-1.8
Scott household paper prods	28,637	31,148	-8.1
Pull-Ups disposable pants	21,930	18,574	18.1
Kotex feminine products	16,872	21,433	-21.3
Goodnites disposable pants	10,376	12,866	-19.4

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$14,348	\$13,566	5.8
Earnings	1,694	1,675	1.1
U.S.	2003	2002	% chg
Sales	8,657	8,649	0.1
Division sales	2003	2002	% chg
Personal care	5,442	5,109	6.5
Consumer tissue	5,258	5,019	4.8
Business-to-business	3,801	3,593	5.8

Headquarters

Kimberly-Clark Corp./351 Phelps Dr., Irving, Texas 75038/Phone: (972) 281-1200.

Personnel, brands, agencies

Corporate: Thomas J. Falk, chmn & CEO.

Childcare Sector: K-C West, 2 Neenah Center, Neenah, Wis. 54956/Phone: (920) 721-2000. Robert D. Thibault, pres.

Ogilvy & Mather Worldwide, New York. Laurel Ritchie, exec grp dir. — Goodnites, Little Swimmers, Pull-Ups.

MindShare Worldwide, New York. Susan Noble, grp plng dir. — media plng.

Family Care Sector: K-C West, 2300 Winchester Rd., Neenah, Wis. 54956/Phone: (920) 721-2000. Rob Van Der Merwe, grp pres.

J. Walter Thompson Co., New York. Hildie Neuman, global bus dir; Ron Burns, pres & bus dir. — Cottonelle Fresh Rollwipes, Kleenex ColdCare, Kleenex Cottonelle, Kleenex, Kleenex Softique, Kleenex Ultra, Scott Bath Tissue, Scott Napkins, Scott Paper Towels, Viva Paper Towels.

MindShare Worldwide, Chicago. Colleen Whitney, grp plng dir. — media plng.

Feminine Care/Adult Care Sector: K-C West, 2001 Marathon Ave., Neenah, Wis. 54956/Phone: (920) 721-2000. Tim Lehman, pres.

Ogilvy Worldwide, Chicago. Kim Isele, mg super. — Depend, Poise.

MindShare Worldwide, Chicago. Susan Noble, grp plng dir. — media plng.

Infant Care Sector: K-C West, 2100 Winchester Rd., Neenah, Wis. 54956/Phone: (920) 721-2000. W. Steve Kalmanson, grp pres.

Ogilvy & Mather Worldwide, New York. Laurel Ritchie, exec grp dir. — Huggies diapers, Huggies Baby Wipes.

MindShare Worldwide, New York. Susan Noble, grp plng dir. — media buying.

81 Kmart Corp.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$6,283	\$20,735	-69.7
Sunday magazine	.0	1,540	NA
Newspaper	.88,388	113,479	-22.1
National newspaper	.161	316	-49.1
Outdoor	.1	18	-95.5
Network TV	.46,906	71,894	-34.8
Spot TV	.7,507	11,346	-33.8
Syndicated TV	.8,843	27,742	-68.1
Cable TV networks	.5,251	10,879	-51.7
Network radio	.5,835	2,652	120.0
National spot radio	.6,421	6,437	-0.3
Internet	.775	2,073	-62.6
Spanish-language TV	.2,543	3,496	-27.3
Business publications	.253	35	634.2
Measured media	.179,166	272,641	-34.3
Unmeasured media	.233,901	355,934	-34.3
Total	.413,067	628,575	-34.3
By brand	2003	2002	% chg
Kmart discount stores	.179,098	271,396	-34.0

Sales & earnings (\$ in millions)

Worldwide & U.S.	2003	2002	% chg
Sales	\$23,253	\$29,352	-20.8
Earnings	-614	-3,219	NA

Headquarters

Kmart Corp./3100 W. Big Beaver Rd., Troy, Mich. 48084/Phone: (248) 463-1000.

Personnel, brands, agencies

Corporate: Kmart Corp./3100 W. Big Beaver Rd., Troy, Mich. 48084/Phone: (248) 463-1000. Julian C. Day, pres & CEO; Paul Guyardo, chief mktg officer.

Grey Worldwide, New York. Steve Blamer, pres; Hal Fass, exec VP, mg ptrn; Jan Egan, exec VP, mg ptrn & creative dir; Ron Castillo, exec VP, mg ptrn & creative dir.

MediaCom, New York. Dene Callas & Jon Mandel, co-CEO; Debra Harris, sr VP & grp media dir. — media buying.

G2 Worldwide, New York. Joe Celia, CEO; Jason Press, sr ptrn & dir-client svcs; Andrew Kibble, creative dir. — brand devel & design.

Meridian, Troy, Mich. Dan Surdell, CEO; Diane Giorlando, acct dir; Larry Haddock, dir-client svcs. — weekly adv circular, newspaper.

WING Latino Group, New York. Jackie Bird, pres; Jose Velez-Silva, grp acct dir; Roberto Alcazar, chief creative dir. — Hispanic adv.

74 Kohl's Corp.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$18,742	\$463	NA
Sunday magazine	.0	2	NA
Newspaper	.76,045	71,865	5.8
National newspaper	.8,564	8,763	-2.3
Outdoor	.1,274	399	219.6
Network TV	.65,762	NA	NA
Spot TV	.62,463	87,297	-28.4
Syndicated TV	.NA	5	NA
Cable TV networks	.24,709	12,014	105.7
Network radio	.13,704	NA	NA
National spot radio	.9,674	15,815	-38.8
Internet	.115	122	-6.2
Business publications	.162	25	544.0
Measured media	.281,214	196,769	42.9
Unmeasured media	.170,461	119,273	42.9
Total	.451,674	316,042	42.9
By brand	2003	2002	% chg
Kohl's department stores	.281,077	196,769	42.8

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$10,282	\$9,120	12.7
Earnings	.591	643	-8.1
U.S.	2003	2002	% chg
Sales	.10,282	9,120	12.7
Division sales	2003	2002	% chg
Kohl's (AA construct)	.10,282	9,120	12.7

Headquarters

Kohl's Corp./N56 W17000 Ridgewood Dr., Menomonee Falls, Wis. 53051-5660/Phone: (262) 703-7000.

Personnel, brands, agencies

Corporate: Larry Montgomery, chmn & CEO; Kevin Mansell, pres; Gary Vasques, exec VP-mktg; Julie Gardner, sr VP-mktg.

McCann Erickson Worldwide, New York. Gary Steele, exec VP.

Universal McCann Worldwide, New York. Mary Gerzema, sr VP-mg dir & plng. — media svcs.

Casanova Pendrill Publicidad, Costa Mesa, Calif. Desiree Lewek, acct dir. — Hispanic adv.

53 Kroger Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$717	\$117	513.0
Sunday magazine	NA	21	NA
Newspaper	74,692	61,054	22.3
Outdoor	2,381	3,162	-24.7
Network TV	NA	36	NA
Spot TV	32,312	26,324	22.7
Cable TV networks	19	92	-79.9
National spot radio	287	1,046	-72.6
Internet	84	6	NA
Spanish-language TV	6	NA	NA
Business publications	51	15	235.8
Local magazines	103	213	-51.7
Measured media	110,651	92,086	20.2
Unmeasured media	500,884	416,843	20.2
Total	611,535	508,929	20.2
By brand	2003	2002	% chg
Kroger food stores	53,932	42,584	26.6
Ralph's food stores	22,121	21,089	4.9
Fred Meyer discount stores ..	13,181	11,356	16.1

Sales & earnings (\$ in millions)

Worldwide & U.S.	2003	2002	% chg
Sales	\$53,791	\$51,760	3.9
Earnings	315	1,205	-73.9

Headquarters

Kroger Co./1014 Vine St., Cincinnati, Ohio 45202-1100/Phone: (513) 762-4000.

Personnel, brands, agencies

Corporate: Joseph A. Pichler, chmn & CEO; Lynn Marmer, grp VP-corp affairs.

Atlanta Division: 2175 Parklake Dr. NE, Ste. 300, Atlanta, Ga. 30345/Phone: (770) 496-7522. Kathy Stratton, adv mgr.

JA&G Advertising, Atlanta. Sam Gingrich, CEO; Steve Jagers, pres; Walt Adamkosky, exec VP & creative dir; Mary Ellen Starling, VP-media.

Sheehy & Associates, Louisville, Ky. Scott Kuhn, acct super; Doris Irwin, media planner/buyer. — media buying.

Central Division: 5960 Castleway West Dr., Indianapolis, Ind. 46250/Phone: (317) 579-8321. Mike Newsom, adv mgr; Joyce Turner, assoc adv mgr.

JA&G Advertising, Cincinnati. Sam Gingrich, CEO; Steve Jagers, pres; Walt Adamkosky, exec VP & creative dir; Nanci Albrecht, sr VP.

Sheehy & Associates, Louisville, Ky. Scott Kuhn, acct super. — media buying.

Cincinnati Division: P.O. Box 46234, 150 Tri-County Pkwy., Cincinnati, Ohio 45246/Phone: (513) 782-3461. Amy Schulten, adv mgr; Paul Greulich, asst mgr.

JA&G Advertising, Cincinnati. Sam Gingrich, CEO; Steve Jagers, pres; Walt Adamkosky, exec VP & creative dir; Mary Ellen Starling, VP-media.

Sheehy & Associates, Louisville, Ky. Scott Kuhn, acct super; Doris Irwin, media planner/buyer. — media buying.

City Market: 555 Sand Hill Lane, Grand Junction, Colo. 81510/Phone: (970) 241-0750. Phyllis Norris, pres; Dan Grassmeyer, dir-adv.

In-house.

Delta Division: P.O. Box 1878, 800 Ridge Lake Blvd., Memphis, Tenn. 38101-1878/Phone: (901) 765-4315. David Chadwick, adv mgr; Whitney Atkins, assoc adv mgr.

JA&G Advertising, Cincinnati. Sam Gingrich, CEO; Steve Jagers, pres; Walt Adamkosky, exec VP & creative dir; Mary Ellen Starling, media dir.

Sheehy & Associates, Louisville, Ky. Scott Kuhn, acct super; Doris Irwin, media planner/buyer.

Dillon Stores Division: 2700 E. 4th St., Hutchinson, Kan. 67501/Phone: (620) 665-5511. Su-Ella McKinzie, adv dir.

In-house. — media buying.

Food 4 Less: 1100 W. Artesia Blvd., Compton, Calif. 90220/Phone: (310) 884-9000. Bob McKee, sr VP-sls & mktg.

Heil-Brice Retail Advertising, Newport Beach, Calif. Jon Boudavos, acct dir.

Fred Meyer: 3800 S.E. 22nd Ave., P.O. Box 42121, Portland, Ore. 97242/Phone: (503) 232-8844. Darrell Webb, pres; Ross Thomas, VP-sls promo & mktg.

In-house.

Fry's Food Stores of Arizona: 500 S. 99th Ave., Tolleson, Ariz. 85353/Phone: (623) 936-2100. Rick Gibb, dir-adv.

In-house.

Great Lakes Division: 4111 Executive Pkwy., Westerville, Ohio 43081/Phone: (614) 898-3235. Dale Hollandsworth, adv mgr.

McCann Erickson Worldwide, Detroit. Charlie Metzger, exec VP.

Sheehy & Associates, Louisville, Ky. Scott Kuhn, acct super; Doris Irwin, media planner/buyer. — media buying.

King Soopers: 65 Tejon St., Denver, Colo. 80223/Phone: (303) 778-3100. Russ Dispense, pres; Derrick Penick, VP-genl merch; Dan Grassmeyer, dir-adv.

In-house.

Mid-Atlantic Division: P.O. Box 14002, 3631 Peter's Creek Rd. NW, Roanoke, Va. 24019/Phone: (540) 563-3500. Carl York, adv mgr.

Sheehy & Associates, Louisville, Ky. Scott Kuhn, acct super; Doris Irwin, media planner/buyer. — media buying, broadcast.

Fahlgren, Parkersburg, W. Va. Andrea Brock, VP media dir. — special projects, outdoor adv.

Mid-South Division: P.O. Box 32680, 10168 Linn Station Rd., Louisville, Ky. 40232-2680/Phone: (502) 423-4800. Ben Harper, adv mgr; Judy Mallow, asst mgr.

Sheehy & Associates, Louisville, Ky. Scott Kuhn, acct super; Doris Irwin, media planner/buyer. — TV creative & media buying.

In-house. — Print creative & media buying.

Quality Food Centers: 10116 N.E. Eighth St., Bellevue, Wash. 98004/Phone: (425) 455-3761. Dean Olson, adv dir.

In-house.

Ralphs Grocery Co.: 1100 W. Artesia Blvd., Compton, Calif. 90220/Phone: (310) 884-9000. Kay Garbizo, VP-adv.

Heil-Brice Retail Advertising, Newport Beach, Calif. Joe Haley, acct dir.

Smith's Food & Drug Centers: 1550 S. Redwood Rd., Salt Lake City, Utah 84104/Phone: (801) 974-1400. Dirk Burningham, adv mgr.

In-house.

Southwest Division: 19245 David Memorial Drive, Shenandoah, Texas 77385/Phone: (713) 507-4800. Kirk Douthit, customer mktg mgr.

In-house. — Print creative & media svcs.

36 Estee Lauder Cos.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$115,231	\$97,782	17.8
Sunday magazine	3,499	2,823	23.9
Newspaper	538	130	313.3
National newspaper	1,109	480	131.2
Outdoor	641	624	2.6
Spot TV	22,919	24,311	-5.7
Syndicated TV	64	NA	NA
Cable TV networks	182	NA	NA
National spot radio	1,210	459	163.5
Internet	287	2,130	-86.5
Spanish-language TV	0	596	NA
Business publications	471	773	-39.0
Local magazines	475	283	68.2
Measured media	146,625	130,391	12.5
Unmeasured media	758,933	674,906	12.5
Total	905,557	805,296	12.5
By brand	2003	2002	% chg
Estee Lauder cosmetics	44,810	38,732	15.7
Clinique skin care products ..	35,984	29,935	20.2
Beyond Paradise fragrance ..	13,998	0	NA

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$5,118	\$4,744	7.9
Earnings	320	192	66.7
Americas	2003	2002	% chg
Sales	2,953	2,878	2.6
Operating income	247	223	10.8
Division sales	2003	2002	% chg
Makeup	1,909	1,791	6.6
Skin Care	1,894	1,703	11.2
Fragrance	1,060	1,017	4.2
Hair Care	229	216	6.0
Other	26	23	13.0

Headquarters

Estee Lauder Cos./767 Fifth Ave., New York, N.Y. 10153/Phone: (212) 572-4200.

Notes

Estee Lauder sold its only mass market cosmetics brand Jane cosmetics line (Jane Cosmetics Worldwide) to newly formed Jane & Co. in early 2004.

Personnel, brands, agencies

Corporate: Leonard A. Lauder, chmn; Fred H. Langhammer, pres & CEO; William P. Lauder, chief operating officer; Dan Brestle, grp pres; Patrick Bousquet-Chavanne, grp pres; Philip Shearer, grp pres; Cedric Prouve, grp pres-intl; Sally Susman, sr VP-global comms.

Bates USA, New York. Mark Morris, chmn. — media buying.

Aramis & Designer Fragrance Brands: 767 Fifth Ave., New York, N.Y. 10153/Phone: (212) 572-3700. Fabrice Weber, global pres; Carol Russo, VP-sls & mktg-N. Amer., Aramis brands; Chuck Irvine, USA VP-sls; Diane Elliott, global VP-mktg, Tommy & Aramis; Robin Mason, exec dir-mktg, Tommy Hilfiger; Mary John Baumann, exec dir-global mktg, Aramis brands; Diane Kim, exec dir-global mktg, Donna Karan.

Bates USA, New York. Mark Morris, chmn.

Aveda Corp.: 4000 Pheasant Ridge Dr. NE, Blaine, Minn. 55449/Phone: (763) 783-4000. Dominique Conseil, pres; Chris Molinari, exec dir-global comms; Chris Hacker, VP-global mktg & design; Mark O'Berski, VP-cons mktg; Rachel Ostrom, dir-adv.

In-house.

Bobbi Brown Professional Cosmetics: 575 Broadway, 4th fl., New York, N.Y. 10012/Phone: (646) 613-6500. Maureen Case, gm; Bill Shaffer, exec dir-visual merch; Lynda Berkowitz, VP-sls, education & global artistry.

In-house.

Clinique Laboratories: 767 Fifth Ave., New York, N.Y. 10153/Phone: (212) 572-3800. Jane Mauksch, sr VP & creative dir ww; Celeste Lalicata, adv dir.

In-house.

Estee Lauder: 767 Fifth Ave., New York, N.Y. 10153/Phone: (212) 572-4200. Peter Lichtenthal, sr VP-global mktg; John Fling, VP-design.

In-house.

M.A.C.: 130 Prince St., 2nd fl., New York, NY 10012/Phone: (212) 965-6300. John Demsey, pres.

In-house.

Origins Natural Resources: 767 Fifth Ave., New York, N.Y. 10153/Phone: (212) 572-4100. Lynne Greene, pres; Roberta Weiss, VP-global mktg; Anelle Miller, sr VP-art & design.

In-house.

Specialty Group: 767 Fifth Ave., New York, N.Y. 10153/Phone: (212) 572-4200. Debra Clark, sr VP mktg ww, La Mer, Jo Malone, Kate Spade Beauty; Elizabeth Park, sr VP-global mktg, Prescriptives; Cathy O'Brien, VP global mktg & global comms, Jo Malone; Jeanne Chinard, sr VP & creative dir ww, Prescriptives, Jo Malone, Kate Spade Beauty, La Mer; Tyler Jones, exec dir-global mktg, La Mer.

In-house.

85 Limited Brands

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$20,472	\$24,360	-16.0
Sunday magazine	272	553	-50.8
Newspaper	467	149	212.7
National newspaper	528	429	23.0

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Outdoor	160	256	-37.7
Network TV	49,370	47,342	4.3
Spot TV	2,716	4,891	-44.5
Syndicated TV	6,021	5,524	9.0
Cable TV networks	5,486	5,606	-2.1
Network radio	301	NA	NA
National spot radio	261	40	552.0
Internet	3,407	3,390	0.5
Business publications	92	114	-19.0
Local magazines	0	85	NA
Measured media	89,552	92,738	-3.4
Unmeasured media	306,994	317,918	-3.4
Total	396,546	410,657	-3.4
By brand	2003	2002	% chg
Victoria's Secret apparel	78,055	76,186	2.5

Sales & earnings (\$ in millions)

Worldwide & U.S.	2003	2002	% chg
Sales	\$8,934	\$8,445	5.8
Earnings	717	502	42.8
Division sales	2003	2002	% chg
Victoria's Secret	3,817	3,586	6.4
Express	2,071	2,073	-0.1
Bath & Body Works	1,934	1,781	8.6
Limited	626	638	-1.9
Other	486	367	32.4

Headquarters

Limited Brands/3 Limited Pkwy., Columbus, Ohio 43230/Phone: (614) 415-7000.

Personnel, brands, agencies

Corporate: Leslie H. Wexner, CEO & chmn; Len Schlesinger, vice chmn & chief operating officer; Edward G. Razek, pres-brand & creative svcs & chief mktg officer; Pattie Glod, VP-media.

In-house.

Initiative Media Worldwide, New York.

Bath & Body Works: 7 Limited Pkwy., Reynoldsburg, Ohio 43068/Phone: (614) 856-6000. Nils Peyron, exec VP-mktg.

In-house.

Express-Express Men's: 1 Limited Pkwy., Columbus, Ohio 43230/Phone: (614) 415-4000. Derek Ungless, exec VP-mktg.

In-house. — Express clothing stores.

Henri Bendel Inc.: 712 Fifth Ave., New York, N.Y. 10019/Phone: (212) 247-1100. Teril Turner, dir-mktg svcs.

In-house.

Limited Stores: 3 Limited Pkwy., Columbus, Ohio 43230/Phone: (614) 415-2000. Stuart DeHaan, creative dir.

In-house.

Victoria's Secret Beauty: 888 Seventh Ave., New York, N.Y. 10106/Phone: (212) 904-7200. Sherry Baker, sr VP & chief mktg officer; Marcia Mossack, sr VP & chief creative officer.

In-house.

Victoria's Secret Direct: 1114 Ave. of the Americas, New York, N.Y. 10036/Phone: (212) 704-0187. Sue Horn, exec VP-mktg.

In-house.

Victoria's Secret Stores: 4 Limited Pkwy., Reynoldsburg, Ohio 43068/Phone: (614) 577-7000. Jill Beraud, exec VP-mktg.

In-house. — Victoria's Secret women's apparel.

22 L'Oreal**U.S. ad spending (\$ in thousands)**

By media	2003	2002	% chg
Magazine	\$271,725	\$250,191	8.6
Sunday magazine	3,682	2,075	77.4
Newspaper	544	378	43.7
National newspaper	1,733	2,044	-15.2
Outdoor	1,112	2,711	-59.0
Network TV	203,365	182,361	11.5
Spot TV	16,433	25,812	-36.3
Syndicated TV	56,756	35,109	61.7
Cable TV networks	52,734	52,951	-0.4
Network radio	390	312	25.0
National spot radio	125	378	-66.9
Internet	2,442	2,417	1.0
Spanish-language TV	19,788	10,648	85.8
Business publications	4,974	5,836	-14.8
Local magazines	306	392	-21.9
Measured media	636,107	573,616	10.9
Unmeasured media	603,310	544,040	10.9
Total	1,239,417	1,117,656	10.9
By brand	2003	2002	% chg
L'Oreal cosmetics	290,262	282,065	2.9
Maybelline cosmetics	102,960	95,174	8.2
Garnier hair products	89,600	38,517	132.6
Lancome cosmetics	39,015	41,185	-5.3
Matrix hair care products	26,233	21,489	22.1
Redken hair care products	17,140	17,204	-0.4
Polo fragrances	10,117	9,454	7.0

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$16,307	\$13,577	20.1
Earnings	1,886	1,383	36.4
North America	2003	2002	% chg
Sales	4,318	4,114	5.0
Division sales	2003	2002	% chg
Cosmetics	15,287	13,257	15.3
Others	687	15	NA
Dermatology	333	305	9.2

Headquarters

L'Oreal/41, rue Martre, Clichy, France 92117/Phone: 33-1-47-56-70-00.

L'Oreal/575 Fifth Ave., New York, N.Y. 10017/Phone: (212) 818-1500.

Personnel, brands, agencies

Corporate: Jean-Paul Agon, pres & CEO; Roger Dolden, exec VP & chief admin officer; Rebecca Caruso, exec VP-external affairs & corp comms; Pamela Gill Alabaster, sr VP-corp comms & media; Edward W. Bullock, VP-diversity.

L'Oreal Luxury Products: 575 Fifth Ave., New York, N.Y. 10017/Phone: (212) 818-1500. Edgar Huber, pres; Biotherm Division: Christine Harrison, gm; Ralph Lauren Fragrances Worldwide: Andrea Robinson, pres; Armani Fragrances: Serge Juerdini, gm; European Designer Fragrances: Jack Wiswall, pres; Kiehl's Since 1851: Philip Clough, pres; Shu Uemura: Chris Salgado, gm;

Lancome Division: Dalia Chammas, sr VP & gm; Active Cosmetics: Stephane Wilmet, gm.

Carlson & Partners, New York. Colleen Rizzo, sr VP & media dir. — Ralph Lauren Fragrances.

Publicis Worldwide, New York. Linda Joselow, exec VP-grp acct dir. — Biotherm, European Designers Fragrances, Lancome Paris.

Optimedia International U.S., New York. Bonnie Barest, exec principal & exec dir-media svcs & mg dir; Matrina Karadiakos, sr principal & media dir; Linda Joselow, exec principal & grp acct dir. — media svcs, Biotherm, European Designers Fragrances, Lancome Paris.

L'Oreal Paris Division (div. of L'Oréal USA): 575 Fifth Ave., New York, N.Y. 10017/Phone: (212) 818-1500. Carol J. Hamilton, pres & gm; Nina White, sr VP-mktg; Vince Frezzo, asst VP-media.

McCann Erickson Worldwide, New York. Carol Smith, exec VP; Patten Jackson, sr VP & grp dir. — Color Cosmetics haircare, haircolor, skincare.

Universal McCann Worldwide, New York. Karin Balik, sr VP-mg dir, plng. — media plng.

La Micela New York, New York. Nick La Micela, CEO & chief creative officer; Brenda Chassey, exec VP-client svcs. — corp awareness adv, Print & Outdoor.

L'Oreal Professional Salon Products: 575 Fifth Ave., New York, N.Y. 10017/Phone: (212) 984-4000. David Craggs, pres; Paul Sharnsky, VP & gm; Pierre Lampert, VP-mktg; Redken Worldwide: Minter Dial, gm; Redken US: Pat Parenty, VP & gm; L'Oreal Classic: Ray Mager, VP & gm; Matrix Global: David Greenberg, gm; Matrix US: Francesca Raminella, VP & gm; Keratase Paris: Frederique Besson, VP & gm.

Publicis Worldwide, New York. Linda Joselow, exec VP-grp acct dir. — L' Oreal Classic Salon Products, Matrix.

Gotham, New York. Sheri Baron, pres; Julie DeLoca, acct dir; Donna Cataldo, chief media officer; Kathi Darnulc, media dir. — media buying, Redken.

In-house. Stuart Sklar, VP-mktg; Deborah Marquardt, assoc VP-comms. — media buying, L' Oreal Classic Salon Products, Matrix.

Burrell Communications Group, Chicago. Donna Beasley, acct dir. — African-American adv.

Maybelline Garnier: 575 Fifth Ave., New York, N.Y. 10017/Phone: (212) 818-1500. Karen Fondu, pres-Maybelline New York-Garnier; Emma Walmsley, gm-Maybelline New York Worldwide.

Publicis Worldwide, New York. Linda Joselow, exec VP-grp acct dir. — Nutrisse, Fructis.

Gotham, New York. Sheri Baron, pres & exec VP & chief media officer; Kathi Darnulc, grp media dir. — media svcs.

Optimedia International U.S., New York. Bonnie Barest, exec VP & mg dir; Matrina Karadiakos, sr principal & media dir. — media buying.

Soft Sheen-Carson Co.: 8522 S. Lafayette Ave., Chicago, Ill. 60620/Phone: (773) 978-0700. Candace S. Matthews, pres; Shawn Tollerson, sr VP-mktg.

Publicis New York, New York. Linda Joselow, exec VP-grp acct dir. — Dark & Lovely, Optimum Oil Therapy, Optimum Care, Hi-Rez.

Carat ICG, Memphis, Tenn. Ken Washburn, VP & acct dir. — media svcs.

Noelle-Elaine Media, New York. Kristen Poe-Hill, acct dir. — event plng, prod launches, publicity.

65 Lowe's Cos.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$16,019	\$13,270	20.7
Newspaper	55,590	44,241	25.7
National newspaper	705	307	130.0
Outdoor	1,298	1,919	-32.4
Network TV	97,147	83,801	15.9
Spot TV	49,460	62,891	-21.4
Syndicated TV	2,224	1,875	18.6
Cable TV networks	57,925	42,472	36.4
National spot radio	18,827	14,544	29.4
Internet	2,794	1,025	172.5
Business publications	197	250	-21.2
Measured media	302,186	266,595	13.4
Unmeasured media	201,484	177,754	13.4
Total	503,671	444,348	13.4
By brand	2003	2002	% chg
Lowe's building supply stores	302,186	266,595	13.4

Sales & earnings (\$ in millions)

Worldwide & U.S.	2003	2002	% chg
Sales	\$30,838	\$26,112	18.1
Earnings	1,877	1,471	27.6

Headquarters

Lowe's Cos./1000 Lowe's Blvd., Mooresville, N.C. 28117/Phone: (704) 758-1000.

Personnel, brands, agencies

Corporate: Robert L. Tillman, chmn & CEO; Robert A. Niblock, pres; Dale C. Pond, sr exec VP-merch & mktg.

McCann Erickson Worldwide, New York. Linda Luca, sr VP & grp dir. — Lowe's stores.

Cultura, Dallas. Melissa Garcia, sr acct super; Lori Reynolds, acct dir. — Hispanic adv.

Footsteps, New York. Melissa Garcia, sr acct super. — African-American adv.

Admerasia, New York. Melissa Garcia, sr acct super. — Asian-American adv.

Coyne Beahm Shouse, Greenville, N.C. Chris Ng Cashin, VP & mgmt super. — direct mktg.

41 Mars Inc.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$98,434	\$84,866	16.0
Sunday magazine	1,946	1,526	27.5
Newspaper	100	741	-86.5
National newspaper	999	484	106.4
Outdoor	3,518	112	NA
Network TV	143,347	115,576	24.0
Spot TV	8,652	9,649	-10.3
Syndicated TV	74,467	53,198	40.0
Cable TV networks	79,397	61,268	29.6
Network radio	4,584	8,642	-47.0
National spot radio	22	504	-95.7
Internet	4,344	3,066	41.7
Spanish-language TV	10,142	5,309	91.0
Business publications	1,596	1,563	2.1
Measured media	431,546	346,504	24.5
Unmeasured media	381,821	306,578	24.5
Total	813,367	653,082	24.5

U.S. ad spending (\$ in thousands)

By brand	2003	2002	% chg
M&M's candy	73,659	68,139	8.1
Snickers candy bar	70,401	48,108	46.3
Pedigree pet food	56,221	41,912	34.1
Starburst candy	28,121	26,111	7.7
Uncle Ben's packaged foods	27,334	31,945	-14.4
Skittles candy	22,998	21,498	7.0
Twix candy bar	22,013	24,037	-8.4
Popables candy	20,934	0	NA
Whiskas cat food	16,684	13,972	19.4
3 Musketeers candy bar	16,266	8,949	81.8
Cesar Select dog food	15,920	5,649	181.8
Cookies & cookies	14,656	11,941	22.7
Milky Way candy bar	14,151	12,375	14.4
Kudos granola bars	11,801	12,537	-5.9

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$18,000	\$18,500	-2.7

Headquarters

Mars Inc./6885 Elm St., McLean, Va. 22101/Phone: (703) 821-4900.

Personnel, brands, agencies

Corporate: Benno Hoogendoorn, co-pres; Peter Cheney, co-pres.

Masterfoods USA: 800 High St., Hackettstown, N.J. 07840/Phone: (908) 852-1000. Bob Gamgort, pres; Peter Littlewood, VP-mktg svcs.

BBDO Worldwide, New York. Rob Rawley, exec VP & sr acct dir. — Kudos, M&M's, Snickers.

Grey Worldwide, New York. David Freilicher, exec VP & mg ptnr. — Aquadrops, Cookies, Dove, Milky Way, Starburst, Twix.

TBWA Worldwide, New York. John McNeel, acct exec (LA); Neal Davies, acct exec (NY). — Combos, Haven, Red Rocket, Lucas, Skittles.

TBWA Worldwide, Los Angeles. John McNeel, acct exec. — Whiskas, Pedigree, Uncle Ben's, Seeds Of Change.

UniWorld Group, New York. Byron Lewis, chmn & CEO. — 3 Musketeers.

Zubi Advertising Services, Coral Gables, Fla. Pamela McGraph, exec VP. — Hispanic adv.

MediaVest, New York. Lisa Donohue, mg dir. — media buying.

Masterfoods USA Pet Care: P.O. Box 58853, Vernon, Calif. 90058/Phone: (323) 587-2727. John Curtiss, gm; Steve Dickstein, mktg dir; Christopher James, mktg dir.

BBDO West, San Francisco. Tom Hollerbach, pres & CEO. — Cesar dog food, Sheba cat food.

Grey Worldwide, Los Angeles. Terry Bowman, exec VP; Shira Elias, mgmt super. — Pedigree and Whiskas Pet Snacks.

TBWA Worldwide, Los Angeles. John McNeel, mg dir. — Pedigree pet food, Whiskas.

MediaVest, New York. Tom Dempsey, sr VP & grp dir. — media buying.

75 MasterCard International**U.S. ad spending (\$ in thousands)**

By media	2003	2002	% chg
Magazine	\$52,521	\$46,253	13.6
Sunday magazine	2,973	3,754	-20.8
Newspaper	5,446	649	739.6

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
National newspaper	4,679	3,931	19.0
Outdoor	949	246	285.8
Network TV	148,629	128,302	15.8
Spot TV	7,675	6,509	17.9
Syndicated TV	23,452	11,772	99.2
Cable TV networks	35,935	30,455	18.0
Network radio	1,599	2,056	-22.2
National spot radio	8,026	5,440	47.5
Internet	9,587	6,914	38.7
Spanish-language TV	11,405	9,200	24.0
Business publications	4,047	2,698	50.0
Local magazines	7	NA	NA
Measured media	316,930	258,178	22.8
Unmeasured media	122,530	99,816	22.8
Total	439,460	357,994	22.8

By brand	2003	2002	% chg
MasterCard credit cards	316,930	258,178	22.8

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$2,231	\$1,892	17.9
Earnings	-386	116	NA

U.S.	2003	2002	% chg
Sales	1,406	1,154	21.8

Headquarters

MasterCard International/2000 Purchase St., Purchase, N.Y. 10577/Phone: (914) 249-2000.

Personnel, brands, agencies

Corporate: Robert W. Selander, pres & CEO; Larry Flanagan, chief mktg officer, global mktg; Ruth Ann Marshall, pres-N. Amer.; Debra Coughlin, sr VP-brand building; Elisa Romm, VP-brand building; Caryl Hahn, VP-global media & new channels; Cheryl Guerin, VP-relationship mktg.

McCann Erickson Worldwide, New York. Peter McGuinness, exec VP & grp mg dir.

GSD&M, Austin, Texas. Jill Otto, VP & grp media dir; Betty Pat McCoy, VP & natl bdcst dir. — media buying.

Integer Group, Dallas. Stacy Sarna, acct dir. — sls promo.

66 Mattel**U.S. ad spending (\$ in thousands)**

By media	2003	2002	% chg
Magazine	\$23,140	\$18,771	23.3
Sunday magazine	92	35	166.0
Newspaper	309	273	13.1
National newspaper	38	124	-69.2
Outdoor	14	11	25.7
Network TV	64,424	49,856	29.2
Spot TV	5,543	1,691	227.7
Syndicated TV	5,435	2,966	83.2
Cable TV networks	87,028	73,155	19.0
Network radio	66	30	119.7
National spot radio	2	10	-74.7
Internet	2,293	1,896	21.0
Spanish-language TV	729	NA	NA
Business publications	601	693	-13.2
Measured media	189,714	149,511	26.9
Unmeasured media	298,083	234,915	26.9
Total	487,798	384,426	26.9

U.S. ad spending (\$ in thousands)

By brand	2003	2002	% chg
Mattel toys	81,342	65,452	24.3
Fisher-Price toys	77,576	65,206	19.0
Barbie toys	12,784	10,338	23.7

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$4,960	\$4,885	1.5
Earnings	538	230	133.9
U.S.	2003	2002	% chg
Sales	3,204	3,422	-6.4
Income bef corp exps	631	691	-8.7
Division sales	2003	2002	% chg
Mattel Brands U.S.	1,594	1,790	-10.9
Fisher-Price Brands U.S.	1,265	1,282	-1.3
American Girl Brands	345	350	-1.4

Headquarters

Mattel/333 Continental Blvd., El Segundo, Calif. 90245-5012/Phone: (310) 252-2000.

Personnel, brands, agencies

Corporate: Robert A. Eckert, chmn & CEO; Rick Dellacquila, sr VP.

Mediaedge:cia Worldwide, New York. Rino Scanzoni, chief implementation officer; Lee Doyle, mg ptrn & client svcs dir; Diane Metzler, mg ptrn & acct dir. — media buying-natl adult TV.

MindShare Worldwide, New York. Jason Maltby, co-exec dir-natl bdcst. — media buying-natl youth TV.

Fisher-Price Brands U.S.: 636 E. Girard, East Aurora, N.Y. 14052/Phone: (716) 687-3000. Neil Friedman, pres; Chuck Scothorn, sr VP-mktg.

Foote, Cone & Belding Worldwide, New York. Jan Weinstein, grp media dir; Kim Corrigan, exec VP & ww acct dir. — Sesame Workshop, Nickelodeon, Disney, Winnie the Pooh.

Infant & Preschool: 636 Girard Ave., East Aurora, N.Y. 14052/Phone: (716) 687-3000. Neil Friedman, pres, Fisher-Price brands.

Foote, Cone & Belding Worldwide, New York. Jan Weinstein, grp media dir; Kim Corrigan, exec VP, ww acct dir. — Barney, Sesame Street, Winnie the Pooh.

Gardner Geary Coll, San Francisco, Calif. Bari Jain, acct dir. — Power Wheels by Fisher-Price.

Mattel Brands, U.S.: 333 Continental Blvd., El Segundo, Calif. 90245-5012/Phone: (310) 252-2000. Matthew Bousquette, pres.

Ogilvy & Mather Worldwide, Culver City, Calif. Rick Roth, pres; Ron Pattani, sr ptrn & ww client svcs dir. — Barbie, girls' activity toys, large dolls, plush, small dolls.

Y&R Advertising, Irvine, Calif. David Murphy, pres & CEO; Chad Kawalec, sr VP & grp acct dir. — electric racing, games & puzzles, Harry Potter, Hot Wheels, male action, Matchbox, Tyco radio control, Uno, My Scene.

davidandgoliath, Los Angeles. — Hot Wheels.

Mediaedge:cia Worldwide, New York. Rino Scanzoni, chief implementation officer; Lee Doyle, mg ptrn & client svcs dir; Diane Metzler, mg ptrn & acct dir.

51 May Department Stores Co.**U.S. ad spending (\$ in thousands)**

By media	2003	2002	% chg
Magazine	\$27,712	\$29,665	-6.6
Sunday magazine	236	603	-60.9
Newspaper	428,432	446,469	-4.0
National newspaper	11,889	12,595	-5.6
Outdoor	2,499	1,525	63.9
Network TV	4,684	4,619	1.4
Spot TV	45,922	44,582	3.0
Syndicated TV	12,074	13,834	-12.7
Cable TV networks	2,281	1,994	14.4
National spot radio	7,572	9,500	-20.3
Internet	553	270	104.8
Business publications	13	NA	NA
Local magazines	795	1,461	-45.6
Measured media	544,663	567,117	-4.0
Unmeasured media	85,310	88,827	-4.0
Total	629,973	655,943	-4.0

By brand	2003	2002	% chg
Robinson's May dept stores ..	109,213	119,620	-8.7
Foley's dept stores	103,522	98,585	5.0
Lord & Taylor dept stores	64,972	77,119	-15.7
Hecht's dept stores	57,123	62,656	-8.8
Filene's dept stores	55,262	51,872	6.5
Kaufmann's dept stores	49,638	38,841	27.8
David's bridal stores	36,262	41,704	-13.1
Strawbridge's dept stores	22,068	23,298	-5.3
Meier & Frank dept stores	11,812	14,243	-17.1
Famous Barr dept stores	10,016	12,934	-22.6

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$13,343	\$13,491	-1.1
Earnings	434	542	-19.9
U.S.	2003	2002	% chg
Sales	13,343	13,491	-1.1
Division sales	2003	2002	% chg
Filene's, Kaufmann's	3,020	3,096	-2.5
Robinsons-May, Meier & Frank ..	2,446	2,466	-0.8
Hecht's, Strawbridge's	2,363	2,379	-0.7
Foley's	1,977	1,995	-0.9
Lord & Taylor	1,823	1,897	-3.9
Famous-Barr, L.S. Ayres, Jones Str ..	1,106	1,150	-3.8
Bridal Group	608	508	19.7

Headquarters

May Department Stores Co./611 Olive St., St. Louis, Mo. 63101/Phone: (314) 342-6300.

Personnel, brands, agencies

Corporate: Gene S. Kahn, chmn & CEO; Joe Civitillo, VP-bdcst adv.

Doner, Detroit. Deena Woodrow, sr VP & media dir; Vera Yardley, sr VP & acct dir. — bdcst creative & bdcst svcs.

David's Bridal/After Hours/Priscilla of Boston: 1001 Washington St., Conshohocken, Pa. 19428/Phone: (610) 943-5000. Gary Schwartz, sr VP-sls promo.

In-house.

Famous-Barr/L.S. Ayres/Jones Store: 601 Olive St., St. Louis, Mo. 63101/Phone: (314) 444-3111. Michael Albrecht, sr VP-sls promo.

In-house.

Filene's/Kaufmann's: 426 Washington St., Boston, Mass. 02108/Phone: (617) 357-2400. Jerry Eccher, sr VP-sls promo.

In-house.

Foley's: 1110 Main St., Houston, Texas 77002/Phone: (713) 405-7033. Jack Mullen, sr VP-sls promo.

In-house.

Hecht's/Strawbridge's: 685 N. Glebe Rd., Arlington, Va. 22203-2199/Phone: (703) 558-1200. Laura Rutenis, sr VP-sls promo.

In-house.

Lord & Taylor: 424 Fifth Ave., New York, N.Y. 10018/Phone: (212) 391-3344. Howard Adler, sr VP-sales promo.

In-house.

Robinsons-May/Meier & Frank: 6160 Laurel Canyon Blvd., North Hollywood, Calif. 91606-3247/Phone: (818) 508-5226. Mark Humphrey, sr VP-sls promo.

In-house.

16 McDonald's Corp.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$19,916	\$13,960	42.7
Sunday magazine	1,423	1,275	11.6
Newspaper	2,090	1,795	16.4
National newspaper	720	993	-27.5
Outdoor	41,582	32,754	27.0
Network TV	256,094	264,842	-3.3
Spot TV	139,128	171,708	-19.0
Syndicated TV	42,289	32,206	31.3
Cable TV networks	71,336	47,155	51.3
Network radio	3,472	6,137	-43.4
National spot radio	5,014	4,138	21.2
Internet	1,125	1,182	-4.8
Spanish-language TV	54,032	44,801	20.6
Business publications	119	64	84.6
Local magazines	7	130	-94.8
Measured media	638,345	623,140	2.4
Unmeasured media	729,945	712,558	2.4
Total	1,368,291	1,335,698	2.4
By brand	2003	2002	% chg
McDonald's restaurants	619,445	605,233	2.3
Boston Market restaurants	17,567	16,978	3.5

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$17,140	\$15,406	11.3
Earnings	1,471	893	64.7
U.S.	2003	2002	% chg
Sales	6,039	5,423	11.4
Operating income	1,982	1,673	18.5

Headquarters

McDonald's Corp./2111 McDonald's Dr, Oak Brook, Ill. 60523/Phone: (630) 623-3000.

Notes

Charlie Bell, 43, took over as CEO of McDonald's Corp. in April 2004 following the sudden death of Chairman & CEO Jim Cantalupo. In little more than a week after becoming the new CEO, Mr. Bell underwent successful cancer surgery. Mr. Bell, president and COO at the time Mr. Cantalupo died, retained his president title. Andrew McKenna, 74, a board member, is now serving as non-executive chairman. McDonald's sold Donatos Pizzeria back to its original founders in December 2003.

Personnel, brands, agencies

Corporate: Andrew McKenna, chmn; Charlie Bell, pres & CEO; Larry Light, exec VP & global chief mktg officer; Mike Roberts, pres-McDonald's USA; Bill Lamar, chief mktg officer-U.S.; Marlena Peleo-Lazar, chief creative officer-U.S.; Peter Sterling, VP-mktg scvs-U.S.; Neil Golden, VP-mktg & rsch-U.S.; Dan Ryan, VP-field mktg-U.S.; Wendy Cook, VP-menu mgmt & mktg-U.S.

DDB Worldwide Communications, Chicago. Dick Rogers, pres, DDB N. Amer.; Don Hoffman, exec VP-acct dir.

Frankel, Chicago. Jenny Cacioppo, exec VP.

Leo Burnett Worldwide, Chicago. Doug Porter, exec VP & ww dir. — youth marketing.

OMD Worldwide, New York. Paul Davey, dir-global; Ed Hughes, dir-Chicago; Susan Morgenstein, dir-New York. — media svcs.

Bandy Carroll Hellige Advertising, Louisville, Ky. Mary Dowell, acct grp dir. — new prods.

Burrell Communications Group, Chicago. Fay Ferguson, mg dir; Vicki Bolton, acct dir. — African-American adv.

Del Rivero Messianu DDB, Coral Gables, Fla. Eduardo Del Rivero, CEO. — Hispanic adv.

Marketing Store, Lombard, Ill. Dean Govostis, exec VP. — sls promo.

Tribal DDB, New York. Paul Gunning, acct dir. — interactive mktg.

Boston Market: 14103 Denver West Pkwy., Golden, Colo. 80401-4086/Phone: (303) 278-9500. Michael D. Andres, pres & CEO; Keith Robinson, sr VP - brand devel.

Arnold Worldwide, Boston. Bill McMullen, sr VP & grp acct dir; John Petruney, sr VP & grp creative dir.

Chipotle Mexican Grill: 1543 Wazee St., Denver, Colo. 80202/Phone: (303) 595-4000. Steve Ells, founder & CEO; Jim Adams, dir-mktg; Dan Fogarty, brand dir.

Mother, New York. Andrew Deitchman, ptrn.

InLine Media, Denver. Nancy Haven, pres. — media svcs.

64 MCI

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$8,862	\$13,105	-32.4
Sunday magazine	1,669	75	NA
Newspaper	6,505	8,604	-24.4
National newspaper	7,647	5,465	39.9
Outdoor	22	81	-72.6
Network TV	66,503	40,371	64.7
Spot TV	5,930	2,485	138.6
Syndicated TV	68,240	43,782	55.9
Cable TV networks	162,317	108,395	49.7
Network radio	NA	2	NA

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
National spot radio	79	1,417	-94.4
Internet	2,441	8,256	-70.4
Spanish-language TV	40,834	37,140	9.9
Business publications	5,624	1,274	341.4
Measured media	376,672	270,451	39.3
Unmeasured media	140,335	100,761	39.3
Total	517,006	371,212	39.3
By brand	2003	2002	% chg
10-10-987 long distance svc	171,427	12,140	NA
MCI telecommunications	105,341	3,922	2585.6
10-10-220 long distance svc	69,204	147,814	-53.2
1-800 Collect long distance svc	24,273	36,836	-34.1

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$27,315	\$32,189	-15.1
Earnings	22,211	-9,192	NA
U.S.	2003	2002	% chg
Sales	20,186	24,849	-18.8
Division sales	2003	2002	% chg
Business markets	14,125	17,466	-19.1
Mass markets	6,375	7,483	-14.8
International	3,860	3,637	6.1
Embratel	2,955	3,603	-18.0

Headquarters

MCI/2001 Loudoun County Pkwy., Ashburn, Va. 20147/Phone: (703) 886-5600.

Personnel, brands, agencies

Corporate: Michael Capellas, chmn, pres & CEO; Patty Proferes, sr VP-brand mgmt & cons mktg; Melissa Parisi, dir-mktg comms.

Euro RSCG Worldwide, New York. Dan McLoughlin, ptrn; Denis Glennon, ptrn.

MPG, New York. Mike Haggerty, exec VP & mg dir. — media svcs.

20 Merck & Co.**U.S. ad spending (\$ in thousands)**

By media	2003	2002	% chg
Magazine	\$132,484	\$96,347	37.5
Sunday magazine	14,492	10,917	32.7
Newspaper	15,215	26,274	-42.1
National newspaper	1,525	2,808	-45.7
Outdoor	25	18	41.2
Network TV	140,116	126,319	10.9
Spot TV	6,212	2,887	115.2
Syndicated TV	20,270	14,904	36.0
Cable TV networks	20,715	40,783	-49.2
Network radio	460	NA	NA
Internet	3,072	3,241	-5.2
Business publications	850	1,148	-26.0
Measured media	355,436	325,646	9.1
Unmeasured media	908,964	832,782	9.1
Total	1,264,400	1,158,428	9.1
By brand	2003	2002	% chg
Singulair Rx	115,251	50,768	127.0
Zocor cholesterol Rx	81,217	93,464	-13.1
Vioxx Osteoarthritis Rx	77,961	72,037	8.2
Fosamax Osteoporosis Rx	53,162	87,511	-39.3
Merck & Co. pharmaceuticals	25,491	19,926	27.9

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$22,486	\$21,446	4.8
Earnings	6,831	7,150	-4.5
U.S.	2003	2002	% chg
Sales	13,321	13,157	1.2
Division sales	2003	2002	% chg
Pharmaceutical	21,038	19,946	5.5
All other	1,219	1,244	-2.0

Headquarters

Merck & Co./One Merck Dr., P.O. Box 100, Whitehouse Station, N.J. 08889-0100/Phone: (908) 423-1000.

Notes

In August 2003, Merck & Co. completed the spinoff of Medco Health Solutions, Inc. from its Medco Health Solutions Division. Medco results were treated as a discontinued operation in Merck's financials for the past two years. In March 2004, Banyu Pharmaceutical Co. became a wholly owned subsidiary of Merck.

Personnel, brands, agencies

Corporate: Raymond V. Gilmartin, chmn, pres & CEO.

Initiative Media Worldwide, New York. Larry Orell, exec VP & gm. — Media buying & rsch.

U.S. Human Health: P.O. Box 4, West Point, Pa. 19486/Phone: (215) 652-5000. David W. Anstice, pres-Human Health; Bradley T. Sheares, pres-U.S. Human Health; Margaret G. McGlynn, pres-U.S. Human Health.

Corbett HealthConnect, Chicago. Richard Nordstrom, exec VP & chief operating officer. — Crixivan (ethical), Maxalt (ethical), Zetia (ethical).

DDB Worldwide Communications, New York. Ellen Fields, grp acct dir. — Arcoxia (DTC), Singular (DTC), Vioxx (DTC).

FCB HealthCare, New York. Tom Domanico, chmn & CEO; ww creative dir; Dana Maiman, pres & CEO. — Arcoxia (prof), Cozaar (prof), Zocor (prof), Vioxx (prof).

Foote, Cone & Belding Worldwide, New York. Mel Sokotch, exec VP, dir-cons healthcare; Margie Wainfain, sr VP & grp mg dir. — Fosamax (DTC & prof).

Hal Lewis Group, Philadelphia. David Winograd, pres; Alex Blanchet, grp acct dir. — Cosopt, Managed Care, Ophthalmics, Prinivil, Prinzide, Trusopt.

Initiative Media North America, New York. Larry Orell, exec VP & gm. — Media buying & rsch.

KPR, New York. Miriam Slome, sr VP & dir-client svcs; Jack Dorsey, sr VP & mgmt sup-Crixivan, Proscar; Lauren Marchitelli, sr acct exec-Proscar, Invanz, Primaxin; Jane Wagner, VP & acct grp sup-Proscar; Laquita Douglas, VP & acct grp sup-Invanz, Primaxin; Lisa Purificato, acct exec-Proscar. — Crixivan, Proscar, Invanz, Primaxin.

Ogilvy & Mather Worldwide, New York. Mike Guarini, exec grp dir. — Zocor (DTC & direct mktg).

Prime Access, New York. Howard Buford, pres & CEO; Mark Wilson, VP-acct dir; Lisa Llewellyn, VP & creative dir; Sharman Davis, media dir. — Fosamax (patient education); Maxalt, merck-source.com, Zocor (African-American adv); AOR African-American, Hispanic, gay & lesbian media buying (DTC).

Regan Campbell Ward, New York. Maureen Regan, mng ptrn. — Candes, merckmedicus.com, mercksource.com.

R/GA, New York. John Antinori, exec producer. — interactive mktg, special projects.

25 Microsoft Corp.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$145,184	\$98,748	47.0
Sunday magazine	3,827	4,678	-18.2
Newspaper	12,768	2,911	338.7
National newspaper	29,980	20,620	45.4
Outdoor	385	3,060	-87.4
Network TV	136,653	104,824	30.4
Spot TV	29,250	11,159	162.1
Syndicated TV	2,136	2,814	-24.1
Cable TV networks	93,385	55,972	66.8
National spot radio	2,543	1,907	33.4
Internet	46,775	64,865	-27.9
Business publications	67,042	80,064	-16.3
Measured media	569,927	451,621	26.2
Unmeasured media	577,275	457,443	26.2
Total	1,147,202	909,064	26.2
By brand	2003	2002	% chg
Microsoft software/Internet	546,669	405,276	34.9
Xbox video game console	18,900	28,034	-32.6

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$32,187	\$28,365	13.5
Earnings	9,993	7,829	27.6
U.S.	2003	2002	% chg
Sales	22,100	20,900	5.7
Income before taxes	14,726	11,513	27.9
Division sales	2003	2002	% chg
Client	10,394	9,360	11.0
Information Worker	9,229	8,212	12.4
Server & Tools	7,140	6,157	16.0
Home and Entertainment	2,748	2,453	12.0
MSN	1,953	1,571	24.3
Microsoft Business Solutions	567	308	84.1
Mobile & Embedded Devices	156	112	39.3
Other	0	192	NA

Headquarters

Microsoft Corp./1 Microsoft Way, Redmond, Wash. 98052-6399/Phone: (425) 882-8080.

Personnel, brands, agencies

Corporate: Bill Gates, chmn & chief software architect; Steve Ballmer, CEO; Mich Mathews, VP-mktg; Mike Delman, gm-adv; Orlando Ayala, grp VP-small & midmarket solutions & ptrn grp. **McCann Erickson Worldwide**, New York. Lori Senecal, dir-TAG ww. — Xbox.

McCann Erickson Worldwide, San Francisco. Michael McLaren, exec VP-dir client svcs. — Microsoft Software, MSN Internet Services.

Universal McCann Worldwide, New York & San Francisco. Mark Stewart, exec VP, chief strategy officer. — media svcs.

Wunderman, New York. Jan Valentic, exec VP & global client leader; Stewart Pearson, exec VP, global client leader. — direct mktg, MSN, servers & tools, home entertainment, mobile.

89 Mitsubishi Motors Corp.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$16,497	\$9,207	79.2
Newspaper	37,076	35,346	4.9
National newspaper	231	262	-12.1
Outdoor	877	862	1.7
Network TV	160,089	191,822	-16.5
Spot TV	27,458	27,382	0.3
Syndicated TV	10,906	4,155	162.5
Cable TV networks	22,619	14,548	55.5
Network radio	9	NA	NA
Internet	893	641	39.2
Business publications	NA	111	NA
Measured media	276,654	284,337	-2.7
Unmeasured media	104,881	107,794	-2.7
Total	381,535	392,130	-2.7
By brand	2003	2002	% chg
Mitsubishi vehicles	276,653	284,336	-2.7

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$22,304	\$31,886	-30.1
Earnings	-1,907	307	NA
North America	2003	2002	% chg
Sales	5,247	9,817	-46.6
Division sales	2003	2002	% chg
Automotive	21,671	31,267	-30.7
Financial svcs	633	619	2.3

Headquarters

Mitsubishi Motors Corp./5-33-8 Shiba, Minato-ku, Tokyo, Japan 108-8410/Phone: 81-3-3456-1111.

Mitsubishi Motors Corp./Mitsubishi Motors North America, 6400 Katella Ave., Cypress, Calif. 90630/Phone: (714) 372-6000.

Personnel, brands, agencies

Corporate: Yoichiro Okazaki, chmn, pres & CEO.

Mitsubishi Motors North America: 6400 Katella Ave., Cypress, Calif. 90630/Phone: (714) 372-6000. Finbarr O'Neill, co-chmn & CEO; Hiroshi Taguchi, sr VP-corp strategy; Ian Beavis, sr VP-mktg; Dotty Diemer, VP-PR.

Deutsch, Los Angeles. Mike Sheldon, mg ptrn & gm. — Mitsubishi vehicles.

Davinci Selectwork, Venice, Calif. Alex Crowther, CEO-Americas; James Moore, mg ptrn. — media buying.

27 Nestle

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$124,362	\$144,692	-14.1
Sunday magazine	2,088	4,230	-50.6
Newspaper	1,426	712	100.3
National newspaper	1,294	623	107.8
Outdoor	800	1,444	-44.6
Network TV	191,451	151,899	26.0
Spot TV	29,940	39,582	-24.4
Syndicated TV	51,204	56,284	-9.0

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Cable TV networks	85,107	71,286	19.4
Network radio	3,406	2,965	14.9
National spot radio	3,621	8,927	-59.4
Internet	16,508	6,660	147.9
Spanish-language TV	6,591	9,329	-29.4
Business publications	2,332	3,069	-24.0
Local magazines	228	179	27.5
Measured media	520,356	501,881	3.7
Unmeasured media	592,361	571,328	3.7
Total	1,112,717	1,073,209	3.7
By brand	2003	2002	% chg
Purina pet food	90,070	93,649	-3.8
Nestle candy, food & bvgs	78,565	60,100	30.7
Stouffer's frozen food	46,147	53,976	-14.5
Lean Cuisine frozen foods	39,976	46,646	-14.3
Friskies cat food	23,867	6,752	253.5
Nescafe coffee	22,395	9,430	137.5
Tidy Cat litter	20,142	23,042	-12.6
Patanol allergy Rx	18,044	15,625	15.5
Taster's Choice instant coffee	16,693	14,566	14.6
Hot Pockets frozen foods	16,508	10,004	65.0
Coffee-Mate non-dairy creamer	16,505	16,314	1.2
Carnation instant breakfast	15,930	27,046	-41.1
Fancy Feast cat food	15,628	7,892	98.0
Powerbar energy bar	12,230	13,848	-11.7
Opti-Free contact lens solution	10,881	10,524	3.4

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$65,301	\$56,328	15.9
Earnings	4,612	4,779	-3.5
Americas	2003	2002	% chg
Sales	20,527	17,732	15.8
EBITA	2,643	2,175	21.5
Division sales	2003	2002	% chg
Beverages	17,457	14,736	18.5
Milk prods, nutrition & ice crm	17,282	14,768	17.0
Prepared dishes/cooking aids	11,926	10,003	19.2
Chocolate, confectionery & biscuits	7,601	6,807	11.7
Petcare	7,286	6,772	7.6
Pharmaceutical products	3,750	3,242	15.7

Headquarters

Nestle/Ave. Nestle 55, Vevey, Switzerland CH-1800/Phone: 41-21-924-2111.

Nestle U.S.A./800 N. Brand Blvd., Glendale, Calif. 91203/Phone: (818) 549-6000.

Notes

Nestle's geographic breakout for the Americas does not include regional numbers on Nestle Waters. Nestle splits all its businesses into geographic regions except for Nestle waters.

Personnel, brands, agencies

Corporate: Rainer E. Gut, chmn; Peter Brabeck-Letmathe, vice chmn & CEO; Nestle USA: Joe M. Weller, chmn & CEO; Al Stefl, sr VP-comms; Karen Crawford, dir-media adv & relationship mktg; Daniel Hachard, dir-visual properties & design; Jackie Lilley, VP-promos & event mktg; Laurie MacDonald, VP-corp & brand affairs; Mary Beth Rymers, dir-market intelligence; Beth Thomas-Kim, dir-cons svcs.

Alcon Laboratories: 6201 South Fwy., Fort Worth, Texas 76134/Phone: (817) 293-0450. Tim Sear, pres & CEO; Glenn Moro, dir-global mktg-contact lens; John Caron, int'l product mgr-anti-allergy; Robert Warner, dir-global mktg-anti-infectives; Stuart Raetzman, VP-global pharmaceutical mktg; Ashish Pal, global mktg-refractive; Rick Rheiner, product dir-intl; Laurent Attias, dir-refractive sls & mktg; Mike Southard, VP-global mktg-surgical; Pierre Morival, dir-global mktg-glaucoma; Rick McLaughlin, dir-global mktg-allergy.

Corbett Accel Healthcare Group, Chicago. Robert DeBartolo, exec VP-dir client svcs. — Opti-Free.

Footie, Cone & Belding Worldwide, New York. Tim O'Hare, sr VP-grp mgmt dir. — consumer mktg.

TBWA Worldwide, New York. Victor Imbimbo, VP-bus devel.

Dreyer's Grand Ice Cream Holdings: 5929 College Ave., Oakland, Calif. 94618/Phone: (800) 888-3442. T. Gary Rogers, chmn & CEO; Tyler Johnson, exec VP-mktg.

Goodby, Silverstein & Partners. Robert Riccardi, ptnr & dir-acct mgmt; Kate Jenkins, acct mgr. — Dreyer's Grand Ice Cream, Edy's Grand Ice Cream, Haagen-Dazs.

J. Walter Thompson Co., Chicago. Scott Remy, dir-acct mgmt. — Nestle ice cream novelties brands.

Galderma: 14501 N. Fwy., Fort Worth, Texas 76177/Phone: (817) 961-5000. Dale Hooks, dir-mktg.

BLVDwest, Newport Beach, Calif. Angela Arthur, acct exec. — Cetaphil.

Nelson Communications, New York. Mike Laferrera, exec VP-mg dir. — Cetaphil, Clindagel, Differin, MetroBrands, Rosanil, Solage, Tri-Luma, Clobex.

Sudler & Hennessey, New York. Wayne Traub, exec VP. — Cetaphil.

Mendoza Dillon & Asociados, Aliso Viejo, Calif. Melanie Cyr, acct exec. — Hispanic adv, Tri-Luma.

Nestle Brands Co.: 800 N. Brand Blvd., Glendale, Calif. 91203/Phone: (818) 549-6000. Brad Alford, pres & CEO; Rob Case, pres-Beverage; Tim Connor, VP sls-Food Services; Dave Hubinger, pres-Confections & Snacks; Chris Lewis, pres-Foreign Trade; Mike Mitchell, pres-sls; Ernie Strapazon, pres-Nutrition.

Dailey & Associates, Los Angeles. Tom Lehr, sr VP & grp mgmt super. — Baby Ruth, Nestle Crunch, Nestle Crunch with Caramel, Willy Wonka products.

J. Walter Thompson Co., Chicago. Scott Remy, dir-acct mgmt. — Butterfinger, Libby's Pumpkin, Toll House Candy Bars, Toll House Morsels, Toll House Refrigerated Cookie & Brownie dough, Treasures, Turtles, Goobers, Nips, Raisinets, Sno-Caps, Carnation Condensed & Evaporated Milks.

McCann Erickson Worldwide, Los Angeles. Durk Barnhill, sr VP & grp mg dir. — Carnation Coffee-mate, Carnation Instant Breakfast, Nescafe Frothe, Good Start formulas, Nescafe, Taster's Choice, Nesquik.

Publicis Worldwide, Dallas. Mark Bateman, exec VP & gm. — Carnation Hot Cocoa, Crosse & Blackwell, Libby's Juicy Juice, Libby's Juicy Juice, J-Max, PowerBar.

Universal McCann Worldwide, New York. George Hayes, exec VP-client svcs dir. — media buying.

Casanova Pendrill Publicidad, Irvine, Calif. Daniel Avina, acct exec; Bryan Garcia, acct dir. — media buying, Hispanic bdcst, Nesquik.

Bromley Interlink, Glendale, Calif. Rosa Esquivel, sr VP-mg dir. — Hispanic adv, Abuelita, Coffee-mate, Libby's Juicy Juice,

Libby's Kerns Nectars, La Lechera, Maggi, Milo, NAN Infant Formula, Nestlé Crunch, Wonka.

O'Grady Meyers, Torrance, Calif. Evelyn Meyers, VP-client svcs. — direct mktg.

Nestle Prepared Foods: 30003 Bainbridge Rd., Solon, Ohio 44139/Phone: (440) 349-5757. Stephen Cunliffe, pres & CEO.

Agency in review. — Hot Pockets, Lean Pockets, Croissant Pockets brand sandwiches.

Euro RSCG Worldwide, New York. Cindy Kenety, ptrn; Bill Harnew, acct dir; John Baker, acct dir. — Stouffer's Lean Cuisine.

J. Walter Thompson Co., Chicago. — Stouffer's Red Box frozen food.

Publicis Worldwide, Dallas. Mark Bateman, exec VP & gm. — Buitoni refrigerated pastas & sauces, Ortega Salsa Prima, Ortega Skillet, Ortega frozen.

Universal McCann Worldwide, New York. George Hayes, exec VP-client svcs dir. — media buying.

Bromley Interlink, Glendale, Calif. Veronica Jimenez, sr acct exec. — Hispanic adv.

Nestle Purina PetCare: Checkboard Square, St. Louis, Mo. 63164/Phone: (314) 982-1000. W.P. McGinnis, CEO & pres; T.E. Block, pres-pet foods, N. Amer; S.L. Crimmins, VP-dog food & new prods; J.C. Vella, VP-cat food mktg; J.T. Quinn, VP-strategic plng, influential & treats; M.L. Crawford, VP cons communication & insights; R. Watt, pres-golden products & litter.

Avrett, Free & Ginsberg, New York. F. Ginsberg, chmn, CEO & creative dir. — Cat Chow, Chef's Blend, Friskies, Kitten Chow.

Berlin Cameron/Red Cell, New York. Andy Berlin, chmn. — Tidy Cat.

CheckMark Communications (In-house), J.K. Lucas, VP & gm. — Alpo dog food, Mighty Dog.

Colle & McVoy, Minneapolis. Jim Bergesen, chmn & CEO. — Vet Diets, Breeder.

Fallon Worldwide, Minneapolis. Patrick R. Fallon, chmn. — Beneful, Dog Chow, ONE Dog, ONE Cat, Pro Plan, Puppy Chow.

Universal McCann Worldwide, New York. George Hayes, exec VP-client svcs dir. — media buying, Fancy Feast.

R/GA, New York. Dawn Winchester, VP-client svcs. — interactive & multichannel mktg, cons awareness & special projects.

Nestle Waters North America: 777 W. Putnam Ave., Greenwich, Conn. 06830/Phone: (203) 531-4100. Kim Jeffery, pres & CEO; Robert Davino, VP-mktg.

McCann Erickson Worldwide, New York. Gregg Fujimoto, sr VP & mgmt dir. — Arrowhead, Deer Park, Ozarka, Poland Spring, Zephyrhills.

Ogilvy & Mather Worldwide, New York. Janet Berg, sr ptrn & mgmt super. — Ice Mountain, Perrier, S.Pellegrino.

Universal McCann Worldwide, New York. George Hayes, exec VP-client svcs dir. — media buying, Arrowhead, Calistoga, Deer Park, Ice Mountain, Ozarka, Perrier, Poland Spring, S.Pellegrino, Zephyr Hills.

Media Horizons, Norwalk, Conn. Alan Kraft, pres & CEO; James Kabakow, sr VP. — direct response media.

Bromley, New York. Jose Gonzalez, sr VP-mg dir. — Hispanic adv, Arrowhead, Ozarka, Poland Springs, Zephyr Hills.

32 News Corp.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$66,681	\$54,245	22.9
Sunday magazine	1,602	5,685	-71.8
Newspaper	134,474	136,165	-1.2
National newspaper	27,518	27,889	-1.3
Outdoor	12,634	12,531	0.8
Network TV	197,894	205,668	-3.8
Spot TV	65,169	59,364	9.8
Syndicated TV	24,335	9,077	168.1
Cable TV networks	122,628	102,743	19.4
Network radio	4,681	5,356	-12.6
National spot radio	67,938	48,903	38.9
Internet	18,992	11,267	68.6
Spanish-language TV	21,935	18,157	20.8
Business publications	12,407	15,987	-22.4
Local magazines	103	68	51.8
Measured media	778,993	713,105	9.2
Unmeasured media	252,786	231,405	9.2
Total	1,031,779	944,509	9.2

By brand	2003	2002	% chg
20th Century Fox movies ...	317,431	294,682	7.7
DirecTV satellite television ..	187,718	154,618	21.4
Fox broadcast & cable TV	97,869	92,370	6.0
Fox Searchlight videos	62,423	64,174	-2.7
News Corp. videos	32,271	60,877	-47.0
fx cable television	18,318	12,642	44.9
X-men videos	13,188	0	NA

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$19,250	\$15,635	23.1
Earnings	1,163	-6,446	NA
U.S.	2003	2002	% chg
Sales	14,601	11,960	22.1
Division sales	2003	2002	% chg
Television	5,253	4,397	19.5
Filmed Entertainment	4,948	4,157	19.0
Newspapers	2,998	2,481	20.8
Cable network programming ..	2,504	1,923	30.2
Book publishing	1,282	1,110	15.5
Other	1,027	678	51.5
Magazines & inserts	1,019	889	14.6
Direct broadcast cable TV	219	0	NA

Headquarters

News Corp./2 Holt St., Surry Hills, N.S.W. Australia 2010/Phone: 612-9288-3000.

News Corp./1211 Ave. of the Americas, 8th fl., New York, N.Y. 10036/Phone: (212) 852-7000.

Notes

News Corp. gained controlling interest in DBS-provider DirecTV in December 2003 by buying from General Motors Corp. a 34% stake in DirecTV Group (formerly known as Hughes Electronics Corp.), parent of the direct broadcast system unit. News Corp. transferred its interest to Fox Entertainment Group. News Corp. in early 2004 sold Major League Baseball team, the Los Angeles Dodgers, for \$430 million to Boston real estate developer Frank

McCourt. News Corp. had purchased the LA team in 1998 for \$320 million from the O'Malley family.

Personnel, brands, agencies

Corporate: K. Rupert Murdoch, chmn & chief exec; Peter Chernin, pres & chief operating officer; Lachlan Murdoch, deputy chief operating officer.

DirecTV Group: 2230 E. Imperial Hwy., El Segundo, Calif. 90245/Phone: . Chase Carey, pres & CEO; Mitch Stern, pres & CEO; Neal Tiles, exec VP-mktg; Stephanie Campbell, sr VP-prog; Bob Marsocci, VP-comms.

BBDO Worldwide, New York. Peter Sherman, sr VP & acct dir.

Fox Broadcasting Co.: 10201 W. Pico Blvd., Los Angeles, Calif. 90035/Phone: (310) 277-2211. Tony Vinciguerra, pres & CEO-Fox Network Grp.; Gail Berman, pres-Entertainment & Fox Broadcasting Co; Ed Wilson, pres-Fox Television Network; John Nesvig, pres-adv sls & exec VP, Fox Television; Roberta Mell, exec VP-mktg; Kaye Bentley, sr VP-natl media-affiliate & natl promo.

No agency. — Fox Broadcasting Co., Fox television stations, Fox television studios, 20th Century Television.

Fox Cable Networks Group: 10000 Santa Monica Blvd., Los Angeles, Calif. 90067/Phone: (310) 286-3800. Anthony J. Vinciguerra, pres & CEO, Fox Networks Group; Lou LaTorre, pres, adv sls; Lindsay Gardner, exec VP-affiliate sls & mktg; Todd Schoen, sr VP-affiliate mktg; Bruce Lefkowitz, exec VP-adv sls, Fox Cable Entertainment; Guy Sousa, exec VP-adv sls, Cable Fox Sports; fx: Peter Liguori, pres & CEO, FX Networks; John Landgraf, pres-Entertainment; Chris Carlisle, exec VP-mktg & promo; Chuck Saffler, sr VP-programming; Eric Shiu, VP-mktg & adv; Kaye Bentley, sr VP-natl media; Fox Sports Net: David Hill, chmn & CEO, Fox Sports Television Grp; Bob Thompson, pres-Fox Sports Net, Fox Sports Networks & Fox Sports Intl; Randy Freer, chief operating officer; Erik Markgraf, exec VP-mktg; Fox Sports World & Fox Sports World Espanol: David Sternberg, sr VP & gm; Veronica Alvarez, dir-mktg & comms; Raul de Quesada, asst gm & VP-mktg & comms; Dermot McQuarrie, asst gm & VP-prog & prod; Fox Sports Digital Nets: David Nathanson, VP & gm; Fuel: David Sternberg, sr VP & gm; CJ Olivares, VP-prog & mktg; Jake Munsey, creative dir; Kimiko Warden, dir-mktg; National Geographic Channel: Laureen Ong, pres; Steven Schiffman, exec VP-mktg & new media; Kiera Hynninen, sr VP-mktg; Rich Goldfarb, sr VP-media sls; Brad Dancer, VP-rsch; Speed Channel: Jim Liberatore, pres; Bill Osborn, sr VP-mktg; Michael Kendall, mktg mgr-media buying; Nancy MacDonald, mktg mgr-branding & event plng; Fox College Sport: Bob Thompson, pres; David Nathanson, VP; Fox Movie Channel: Chuck Saffler, sr VP & gm; Bill Hall, VP-prog & prod.

Cliff Freeman & Partners, New York. Eric Silver, exec VP-creative dir. — Fox Sports Net.

Foote, Cone & Belding Worldwide, San Francisco. Michael Chamberlin, acct dir. — Fox Sports Net.

TBWA Worldwide, San Francisco. Jenny Leonetti, acct dir. — Fox Sports Net.

In-house. — Fox Sports Net, Fox Sports World, Fox Sports en Espanol, Fuel, FX, National Geographic Channel, Speed Channel.

Communication Trends, Atlanta. Lynette Fine, VP-acct svcs. — media buying, Fox Cable Networks Group, Fox Sports World, Fox Sports en Espanol.

Media Storm, S. Norwalk, Conn. Craig Woerz, mg ptnr. — media buying, FX.

Media First International, New York. Richard J. Kostyra, pres & CEO. — media svcs, Speed Channel.

Fox Filmed Entertainment: 10201 W. Pico Blvd., Los Angeles, Calif. 90035/Phone: (310) 277-2211. Jim Gianopolous, chmn; Tom Rothman, chmn; Robert Harper, vice chmn, Twentieth Century Fox & exec VP-Fox Filmed Entertainment; Bruce Snyder, pres-domestic distribution; Pamela Levine, co-pres-domestic distribution theatrical mktg; Tony Sella, co-pres-domestic distribution theatrical mktg; Elizabeth Gabler, pres-Fox 2000 Pictures; Chris Meledandri, pres-Animation; Peter Rice, pres-Fox Searchlight; Cheryl Idell, exec VP-media & mktg plng.

MindShare Worldwide, New York. Marc Goldstein, pres & CEO-N. Amer. — 20th Century Fox, 20th Century Fox Animation, 20th Century Fox Television, Fox 2000 Pictures, Fox Searchlight Pictures.

Fox News: 1211 Ave. of the Americas, New York, N.Y. 10036/Phone: (212) 301-3000. Roger Ailes, chmn & CEO; Jack Abernathy, exec VP; Paul Rittenberg, sr VP-ad sales.

In-house. Michael Tammero, sr mgr-mktg.

Fox Television Stations: 1999 S. Bundy Dr., Los Angeles, Calif. 90025-5235/Phone: (310) 584-2000. Lachlan Murdoch, chmn & CEO; Jim Burke, pres-sales; Tom Herwitz, pres-station opers; Leslie Lyndon, VP-adv & promo; Lori Terwell Asbury, VP-adv & promo.

No agency.

HarperCollins Publishers: 10 E. 53rd St., New York, N.Y. 10022/Phone: (212) 207-7000. Jane Friedman, pres & CEO; Glenn D' Agnes, exec VP & chief operating officer.

Ziccardi Partners Frierson Mee, New York. Joe Fontana, gen mgr. — media svcs, Imprints: Access, Amistad, Avon, Caedmon, Joanna Cotler Books, Dark Alley, Ecco, Eos, Fourth Estate, Laura Geringer Books, Greenwillow Books, HarperAudio, HarperBusiness, HarperCollins, HarperCollins Children's Books, Harper Design International, HarperEntertainment, HarperFestival, HarperLargePrint, HarperResource, HarperSanFrancisco, HarperTempest, HarperTorch, HarperTrophy, Katherine Tegen Books, William Morrow, William Morrow Cookbooks, Perennial, PerfectBound, Quill, Rayo, ReganBooks.

In-house. Laurie Rippon, sr VP & creative dir; Rockelle Henderson, dir-adv & promo. — Co-op & Niche mktg.

New York Post: 1211 Ave. of the Americas, New York, N.Y. 10036/Phone: (212) 930-8000. Lachlan Murdoch, publisher; Geoff Booth, VP & genl mgr; Vin Montuori, VP-mktg.

In-house. Kenneth Kiczales, natl adv mgr; Lisa Barnett, promo dir.

Merkley & Partners, New York. Alex Gellert, mg dir & ptnr.

News America Marketing: 1211 Ave. of the Americas, 5th fl., New York, N.Y. 10036/Phone: (212) 782-8000. Paul V. Carlucci, CEO; Chris Mixson, pres; Eugene Klein, chief operating officer; Martin Garafalo, exec VP-retail; Jesse Aversano, sr VP-mktg & bus mgmt.

In-house.

The Weekly Standard: 1150 17th St., NW, ste. 505, Washington, 20036/Phone: (202) 293-4900. Terry Eastland, publisher; Lauren Husted, circulation dir; Nicholas H.B. Swezey, adv & mktg mgr.

BMD, Alexandria, Va. Chris Prichard, VP. — direct mktg.

79 Nextel Communications

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$6,076	\$4,267	42.4
Newspaper	137,191	93,765	46.3
National newspaper	13,457	11,088	21.4
Outdoor	19,131	18,057	5.9
Network TV	52,190	38,808	34.5
Spot TV	4,237	3,540	19.7
Syndicated TV	223	141	57.8
Cable TV networks	11,289	13,199	-14.5
Network radio	500	400	25.0
National spot radio	14,859	14,159	4.9
Internet	1,561	521	199.9
Spanish-language TV	1,078	NA	NA
Business publications	3,052	1,972	54.8
Local magazines	12	NA	NA
Measured media	264,855	199,917	32.5
Unmeasured media	158,608	119,720	32.5
Total	423,463	319,636	32.5
By brand	2003	2002	% chg
Nextel telecommunications	264,520	199,887	32.3

Sales & earnings (\$ in millions)

Worldwide & U.S.	2003	2002	% chg
Sales	\$9,892	\$8,186	20.8
Earnings	2,522	1,536	64.2

Headquarters

Nextel Communications/2001 Edmund Halley Dr., Reston, Va. 20191/Phone: (703) 443-4000.

Notes

The Winston Cup in Nascar racing became the Nascar Nextel Cup Series in 2003 after Nextel signed an estimated \$750 million deal covering the next 10 years as prime sponsor of the stock-car racing group. R. J. Reynolds Tobacco Co., maker of Winston cigarettes, had sponsored the circuit for more than 30 years.

Personnel, brands, agencies

Corporate: Timothy M. Donahue, pres & CEO; Mark Schweitzer, sr VP-mktg.

TBWA/Chiat/Day, New York. Robert Birge, acct exec.

MindShare Worldwide, New York. Brian Huges, strategic plng dir. — media svcs, Nextel.

59 Nike

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$73,555	\$86,629	-15.1
Sunday magazine	1,275	1,033	23.5
Newspaper	562	567	-0.9
National newspaper	389	643	-39.5
Outdoor	3,274	5,145	-36.4
Network TV	80,317	102,406	-21.6
Spot TV	1,739	2,653	-34.4
Syndicated TV	6,346	7,194	-11.8
Cable TV networks	40,532	26,891	50.7
Network radio	NA	300	NA
National spot radio	3,009	963	212.4

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Internet	2,086	687	203.7
Spanish-language TV	1,149	3,655	-68.6
Business publications	98	407	-75.9
Local magazines	82	6	NA
Measured media	214,414	239,178	-10.4
Unmeasured media	344,551	384,346	-10.4
Total	558,965	623,524	-10.4
By brand	2003	2002	% chg
Nike shoes & apparel	199,965	226,438	-11.7

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$10,697	\$9,893	8.1
Earnings	474	663	-28.5
U.S.	2003	2002	% chg
Sales	4,658	4,670	-0.3
Pre-tax Income	958	956	0.2
Division sales	2003	2002	% chg
Footwear	5,985	5,677	5.4
Apparel	3,132	2,804	11.7
Other brands	911	816	11.6
Equipment	669	594	12.6

Headquarters

Nike/One Bowerman Dr., Beaverton, Ore. 97005/Phone: (503) 671-6453.

Personnel, brands, agencies

Corporate: Philip Knight, chmn & CEO; Gary DeStefano, pres-U.S. ops; Trevor Edwards, VP-global brand mktg; Joaue Hidalgo, VP-U.S. brand mktg; Nancy Monsarrat, dir-U.S. adv.

Wieden & Kennedy, Portland, Ore. Rebecca VanDyck, acct dir; Lawrence Teherani-Ami, media dir. — Nike shoes & apparel.

R/GA, New York. Matt Howe, exec producer. — interactive, multichannel & multicultural mktg, e-commerce devel.

Cole Haan: 1 Cole Haan Dr., Yarmouth, Maine 04096/Phone: (207) 846-2500. Matthew Rubel, chmn & CEO; Gordon Thompson III, creative dir & exec VP; Jim Clopton, sr VP-slcs; Bill Zeitz, VP-brand mktg.

Lloyd & Co., New York. Jodi Sweetbaum, acct exec. — Cole Haan.

Media Works, Boston. Debbie Haggerty, VP-media. — media buying, Cole Haan.

19 Nissan Motor Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$211,015	\$165,171	27.8
Sunday magazine	3,590	2,023	77.4
Newspaper	33,468	19,992	67.4
National newspaper	19,225	15,783	21.8
Outdoor	32,235	12,870	150.5
Network TV	249,408	196,870	26.7
Spot TV	320,141	240,239	33.3
Syndicated TV	9,995	7,045	41.9
Cable TV networks	66,249	41,231	60.7
Network radio	2,215	2,512	-11.8
National spot radio	828	632	31.0
Internet	5,053	5,088	-0.7

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Spanish-language TV	6,092	4,183	45.6
Business publications	1,364	815	67.4
Local magazines	960	394	143.5
Measured media	961,837	714,849	34.6
Unmeasured media	338,860	251,845	34.6
Total	1,300,698	966,694	34.6
By brand	2003	2002	% chg
Nissan vehicles	776,142	560,407	38.5
Infiniti vehicles	185,673	154,442	20.2

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$65,769	\$56,048	17.3
Earnings	4,459	4,064	9.7
North America	2003	2002	% chg
Sales	29,028	23,634	22.8
Operating income	3,540	2,500	41.6
Division sales	2003	2002	% chg
Automotive	62,615	52,895	18.4
Financing	3,154	3,153	0.0

Headquarters

Nissan Motor Co./17-1, Ginza 6-chome, Chuo-ku, Tokyo, Japan 104-8023/Phone: 81-3-3543-5523.

Nissan Motor Co./Nissan North America, 18501 S. Figueroa St., P.O. Box 191, Gardena, Calif. 90248-0191/Phone: (310) 532-3111.

Notes

Nissan in June opened a review of its Hispanic advertising account. Incumbent Ornelas & Associates, Los Angeles, will defend. A decision is expected by early fall.

Personnel, brands, agencies

Corporate: Carlos Ghosn, pres & CEO; Norio Matsumura, exec VP mktg; Steve Wilhite, sr VP-global mktg; Nissan North America: Jed Connelly, sr VP-sls & mktg; John Rinek, dir-media & agency mgmt; Ian Thompson, VP-mktg; Takeo Kitamura, VP-pricing & research; Karen Gustafson, corp mgr-media; Lisa LaCasse, mgr-media plng.

Infiniti Division: 18600 S. Figueroa St., Gardena, Calif. 90248-0191/Phone: (310) 532-3111. Mark Igo, VP & gm; Scott Fessenden, dir-mktg.

TBWA Worldwide, Los Angeles & New York. Tom Blessington, mg dir; Jay Kelly, acct exec-regional — Infiniti vehicles.

OMD Worldwide, Los Angeles. Rich Rivera, acct dir. — media svcs.

True Agency, Los Angeles. Valencia Gayles, chief operating officer. — African-American adv.

Nissan Division: 18600 S. Figueroa St., Gardena, Calif. 90248-0191/Phone: (310) 532-3111. Mark McNabb, VP & gm; Fred Suckow, dir-mktg; Kim McCullough, corp mgr-adv.

TBWA Worldwide, Los Angeles. Tom Blessington, mg dir. — Nissan vehicles.

OMD Worldwide, Los Angeles. Rich Rivera, acct dir. — media svcs.

Ornelas & Associates, Dallas. Marjorie Ornelas, acct dir. — Hispanic adv.

True Agency, Los Angeles. Valencia Gayles, chief operating officer. — African-American adv.

34 Novartis**U.S. ad spending (\$ in thousands)**

By media	2003	2002	% chg
Magazine	\$79,307	\$54,394	45.8
Sunday magazine	2,959	596	396.6
Newspaper	2,173	911	138.6
National newspaper	3,325	2,542	30.8
Outdoor	32	45	-30.2
Network TV	147,201	94,128	56.4
Spot TV	23,639	13,550	74.5
Syndicated TV	26,661	22,928	16.3
Cable TV networks	98,176	38,049	158.0
Network radio	3,961	NA	NA
National spot radio	2,180	2,443	-10.8
Internet	3,334	1,119	197.9
Spanish-language TV	46	NA	NA
Business publications	1,919	1,917	0.1
Measured media	394,914	232,623	69.8
Unmeasured media	571,632	336,718	69.8
Total	966,546	569,341	69.8
By brand	2003	2002	% chg
Lamisil nail fungus Rx	67,791	59,513	13.9
Elidel eczema Rx	67,604	542	12370.7
Zelnorm Rx	48,109	0	NA
Gerber baby food & prods	48,059	47,943	0.2
Deramaxx dog Rx	18,688	0	NA
Triaminic cough syrup	17,578	19,037	-7.7
Maalox antacid	15,248	14,258	6.9
Night & Day contact lenses	13,708	11,377	20.5
Freshlook contact lenses	13,311	7,618	74.7
Benefiber fiber laxative	10,854	12,354	-12.1
Novartis pharmaceuticals	10,727	12,233	-12.3

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$24,864	\$20,877	19.1
Earnings	5,016	4,725	6.2
U.S.	2003	2002	% chg
Sales	6,568	8,805	-25.4
Operating income	1,813	NA	NA
Division sales	2003	2002	% chg
Pharmaceuticals	16,020	13,528	18.4
Consumer health	8,844	7,349	20.3

Headquarters

Novartis/Lischstrasse 35, Basel, Switzerland CH 4002/Phone: 41-61-324-1111.

Novartis/Novartis Corp., 608 Fifth Ave., New York, N.Y. 10020/Phone: (212) 307-1122.

Notes

Swiss drug maker Novartis in April 2004 lost out in its bid to enter merger negotiations with French-Germany pharmaceutical company Aventis, the latter opting for a merger with Paris-based Sanofi-Synthelabo which sweetened its initial unwanted bid of \$59 billion to \$65 billion. The French government was against the Novartis deal, preferring one that would keep the pharmaceutical business local.

Personnel, brands, agencies

Corporate: Daniel Vasella, chmn & CEO; Terry Barnett, pres & CEO.

MindShare Worldwide, New York. Beth LeMessururier, sr VP & acct dir. — media svcs.

CIBA Vision Corp.: 11460 Johns Creek Pkwy., Duluth, Ga. 30097/Phone: (770) 476-3937. Joseph T. Mallof, pres-N. Amer. Bus; Julie Collins, dir-cons mktg.

Grey Worldwide, New York. Milt Weinstock, exec VP-global acct dir. — Focus Dallies, FreshLook, Night & Day contact lenses.

Gerber Life Insurance Co.: 1131 Mamaroneck Ave., White Plains, N.Y. 10605/Phone: (914) 272-4000. Wesley David Protheroe, pres; Peter Mendelson, sr VP-dir mktg.

In-house.

Novartis Animal Health U.S.: 3200 Northline Ave., Ste. 300, Greensboro, N.C. 27408/Phone: (336) 387-1000. Andy Ferrigno, dir-mktg; Darrell Klug, dir-mktg parasiticides.

In-house. — Deramaxx, Atopica, Adequan, Clomicalm, Percorten V, Ethicon, Sentinel, Interceptor, Capstar, Program, Milbemite.

Colle & McVoy, Minneapolis. Janet McGrath, chief strategic officer; Tom Lindell, pr sr consultant. — Deramaxx.

Novartis Consumer Health: 200 Kimble Dr., Parsippany, N.J. 07054-0622/Phone: (973) 503-8000. Paul Choffa, CEO; Lynne Millheiser, sr VP-OTC bus unit; David Yates, sr VP-Gerber; Jim Lawenda, dir-media & adv svcs-OTC.

Arnold Worldwide, New York. Barry Silverstein, exec VP & grp dir. — Tavist, Theraflu, Triaminic.

DDB Corbett Worldwide Healthcare Communications, Chicago. Charles Austin, sr VP. — Denavir, Transderm Scop.

Grey Worldwide, New York. Donna Jackson, exec asst acct coordinator. — Benefiber, Cruex, Desenex, Ex-Lax, Gas-X, Lamisil AT, Maalox, Stride Guard.

Noble BBDS, Chicago. Elizabeth Sanderson, pres. — Gerber baby food, Gerber Wellness.

Novartis Pharmaceuticals Corp.: 59 Route 10, East Hanover, N.J. 07936/Phone: (973) 781-8300. Paulo Costa, pres & CEO; Deborah Dick-Rath, exec dir-global adv; David Epstein, head-oncology bus unit; Larry Perlow, exec VP & gm-mature prods; Kurt Graves, VP-mass mktg & brand mgmt bus unit; Doug Saltell, VP-neuroscience bus unit; Debbie Dunsire, VP-oncology bus unit; Anthony Venditti, VP-new prod commercialization; Barbara Rosengren, VP-new prod mktg; Cynthia Hogan, VP-pediatrics/respiratory/dermatology; Mark Iwicki, VP-gastrointestinal/bone/analgesic; Flemming Ornskov, VP-cardiovascular/metabolic.

Alchemy, New York. Rich Pounder, pres & CEO. — Foradil, Lamisil, Starlix.

Cline Davis & Mann, New York. Carol DiSanto, dir-client svcs. — Foradil, Prexige.

CommonHealth, Morristown, N.J. Matt Giegerich, pres & CEO; Bruce Epstein, pres-Noesis Healthcare Interactions. — Elidel, Zometa.

Deutsch, New York. Val Di Febo, mg ptnr & gm. — Lamisil Tablets, Zelnorm, Diovan.

Euro RSCG Adrenaline, New York. Terry Gallo, pres; Lori Pepper, sr VP. — Stalevo.

Euro RSCG Life Chelsea, New York. Ed Stapor, pres; Pamela Pinta, exec VP & dir client svcs; Jennifer Wohl, acct super-Comtan/Stalevo; Robert Schaffer, sr VP-Ritalin LA/Focalin —

Comtan, Focalin, Ritalin LA, Triple Combination.

FCB Healthcare, New York. Tom Domanico, chmn, CEO & ww creative dir; Dana Maiman, pres & CEO — Exjade (prof).

Harrison & Star Business Group, New York. Aredia: Blair Price, grp acct super; Zometa: Kevin Murtha, grp acct super. — Aredia, Zometa.

Integrated Communications Corp., Lawrenceville, N.J. Steve Vivano, exec VP & dir-acct svcs; Rich Minoff, sr acct coordinator. — Apligraf, Certican, Desferal, Exelon, Foradil, Lamisil, Miacalcin, Neoral, Sandostatin, Sandoglobulin, STI, Simulect, Trileptal, Zomaril.

33 J.C. Penney Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$29,835	\$21,530	38.6
Sunday magazine	2,499	2,820	-11.4
Newspaper	117,537	110,489	6.4
National newspaper	893	962	-7.1
Outdoor	279	376	-25.7
Network TV	143,247	143,089	0.1
Spot TV	2,412	3,122	-22.7
Syndicated TV	787	6,169	-87.2
Cable TV networks	35,518	32,683	8.7
Network radio	24,422	22,366	9.2
National spot radio	10,534	13,012	-19.0
Internet	21,662	9,656	124.3
Spanish-language TV	19,919	19,319	3.1
Business publications	357	499	-28.4
Measured media	409,901	386,089	6.2
Unmeasured media	614,852	579,133	6.2
Total	1,024,753	965,222	6.2
By brand	2003	2002	% chg
J.C. Penney Co. dept stores ..	402,317	382,563	5.2

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$17,786	\$17,633	0.9
Earnings	-928	405	NA
U.S.	2003	2002	% chg
Sales	17,786	17,633	0.9
Income cont. oper	364	285	27.7

Headquarters

J.C. Penney Co./6501 Legacy Dr., Plano, Texas 75024-3698/Phone: (972) 431-1000.

Notes

J.C. Penney is selling its troubled Eckerd Drug Stores to CVS Corp. and Jean Coutu Group. Eckerd, bought by the retailer in 1996, grew to 2,600 stores in 20 states but suffered heavy losses in 2003 on sales of \$15.1 billion. Eckerd is treated as a discontinued operation in J.C. Penney's financial data. J.C. Penney for 2003 reported spending about a quarter of its advertising costs on its catalog, same as 2002.

Personnel, brands, agencies

Corporate: Allen Questrom, chmn & CEO; Vanessa Castagna, chmn & CEO-J.C. Penney stores, catalog & internet; Ken Hicks, pres & chief operating officer-J.C. Penney stores & merch ops; Mike Boylson, exec VP & chief mktg officer; Michael Cape, VP & dir-brand mktg & graphic design; Leslie Palmer, VP & dir-cre-

ative svcs; Todd Beurman, natl adv dir; Stephanie Walton, natl media mgr; Merle Davidson, local market media dir; Stephanie Brown, mgr-corp brand publicity; Manny Fernandez, mgr-multi-cultural & specialty mktg support; Tim Chalmers, mgr-packaging & labeling.

DDB Worldwide Communications, Chicago & Dallas. David Polston, sr VP & grp acct dir.

OMD Worldwide, Dallas & Chicago. Scot Butler, media dir; Andy Rowe, grp media dir. — media plng, bdcst & print buying.

American Communications Group, Torrance, Calif. Christopher Cope, pres; William Gamble, VP & acct super. — media buying-newspaper.

Dieste, Harmel & Partners, Dallas. Tony Dieste, CEO; Warren Harmel, pres; Edgar Cardoze, exec media dir; Sandra Soliz, acct dir. — Hispanic adv.

InterTrend Communications, Long Beach, Calif. Julia Huang, pres & CEO; Wade Huang, acct dir; Rita Cheng, sr acct super. — Asian-American adv.

23 PepsiCo

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$104,494	\$62,024	68.5
Sunday magazine	2,238	2,161	3.6
Newspaper	6,021	3,566	68.9
National newspaper	1,462	768	90.3
Outdoor	4,343	5,840	-25.6
Network TV	423,183	369,254	14.6
Spot TV	69,071	112,415	-38.6
Syndicated TV	41,269	53,818	-23.3
Cable TV networks	130,367	108,818	19.8
Network radio	110	22	400.5
National spot radio	4,716	5,201	-9.3
Internet	25,936	38,134	-32.0
Spanish-language TV	76,276	55,399	37.7
Business publications	1,614	1,472	9.6
Local magazines	13	7	81.4
Measured media	891,111	818,898	8.8
Unmeasured media	321,040	295,024	8.8
Total	1,212,151	1,113,922	8.8
By brand	2003	2002	% chg
Pepsi soft drinks	207,842	227,784	-8.8
Gatorade sports drinks	131,000	132,893	-1.4
Quaker cereals	120,947	120,586	0.3
Tropicana orange juice	75,575	47,196	60.1
Sierra Mist soft drinks	64,439	28,815	123.6
Mountain Dew soft drinks	60,676	70,087	-13.4
Lays potato chips & snacks	57,888	28,827	100.8
Propel flavored water	34,095	31,425	8.5
Tostitos chips	29,038	21,296	36.4
Aquafina purified water	24,647	36,891	-33.2
Doritos chips	20,026	36,668	-45.4
Pasta Roni pasta mixes	12,615	3,232	290.3
Ruffles potato chips	11,824	8,453	39.9

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$26,971	\$25,112	7.4
Earnings	3,568	3,000	18.9
U.S.	2003	2002	% chg
Sales	17,377	16,588	4.8
Income before taxes	3,267	3,178	2.8

Division sales	2003	2002	% chg
Frito-Lay North America	9,091	8,565	6.1
PepsiCo International	8,678	7,749	12.0
PepsiCo Beverages N. Amer.	7,733	7,200	7.4
Quaker Foods North America	1,467	1,464	0.2

Headquarters

PepsiCo/700 Anderson Hill Rd., Purchase, N.Y. 10577/Phone: (914) 253-2000.

Notes

PepsiCo took steps in the fourth quarter of 2003 to streamline its struggling juice business by consolidating management of Tropicana, Dole and its other juice drinks in Chicago, home base to Quaker Foods and Gatorade units. The move also involved management changes, closure of some manufacturing lines and the elimination of 750 jobs companywide. PepsiCo also began to expense stock options. Its intent is to peg executive compensation more to restricted stock. Jim Dwyer, president of Tropicana North America, assisted in the transition and then planned to leave in early 2004. Other Tropicana employees moved to Chicago from their Bradenton, Fla., headquarters. The new juices group got a new president, Greg Shearson, who left the company's food and beverage operations in Canada as president. Pepsi's carbonated drinks and waters remain based in Purchase, N.Y.

Personnel, brands, agencies

Corporate: Steve Reinemund, chmn & CEO.

No agency.

Frito-Lay North America: 7701 Legacy Dr., Plano, Texas 75024/Phone: (972) 334-7000. Al Bru, chmn & CEO, Frito-Lay N. Amer.

BBDO Worldwide, New York. Tom Sebok, exec VP & mg dir. — 3D's, Baked Lay's, Cheetos, Crispy mini snacks, Doritos, fruit & oatmeal bars, Gatorade energy bar, Lay's, Quaker Chewy granola bars, Rold Gold, Ruffles.

GSD&M, Austin, Texas. David Eiben, acct dir. — Tostitos.

OMD Worldwide, New York. Kevin McCarthy, dir; John Swift, dir. — media svcs.

Atmosphere BBDO, New York. Andreas Combuechen, CEO & chief creative officer. — interactive mktg.

Dieste, Harmel & Partners, Dallas. Paul Traeger, acct dir. — Hispanic adv.

North American Coffee Partnership (joint venture with Starbucks Coffee).

Fallon Worldwide, New York. Mark Strong, acct dir; Dominique Sanderson, acct dir. — Bottled Frappuccino, Starbucks DoubleShot.

Pepsi Beverages & Food North America: 555 W. Monroe St., Chicago, Ill. 60661/Phone: (312) 821-1000. Gary Rodkin, pres & CEO-Pepsi Beverages & Foods N. Amer.

BBDO Worldwide, New York. Cathy Israelevitz, sr VP & sr acct dir. — Aquafina, Code Red, Diet Mountain Dew, Diet Pepsi, Diet Sierra Mist, Fruitworks, Mountain Dew, Mug root beer, Pepsi-Cola, Pepsi ONE, Pepsi Twist, Wild Cherry Pepsi.

Element 79 Partners, Chicago. Dennis Ryan, exec creative dir. — 100% Natural cereals, Aunt Jemima food prods, Cap'n Crunch, Dole fruit juices, Gatorade, Golden Grain, Near East, Pasta Roni pasta mixes, Propel fitness flavored bottled water, Quaker cereal & food, Quaker Toasted Oatmeal, Rice-A-Roni, Tropicana beverages.

OMD Worldwide, New York & Chicago. Gail Stein, client comms dir-Pepsi-Cola N. Amer.; John Swift, client comms dir-PepsiCo; Bob Porcaro, dir. — media svcs, Gatorade, Quaker, Tropicana beverages.

J. Walter Thompson Co., New York. Stephanie Hancock, sr ptnr & mgmt dir. — Lipton Brisk, Lipton Brisk Fruit Teaser, Lipton Brisk Lemonade, Lipton Fusion, Lipton Iced Tea, Matika.

Dieste, Harmel & Partners, Dallas. Jaime Gonzalez-Mir, acct dir. — Hispanic adv.

Spike DDB, New York. Richard Schropschier, acct dir. — African-American adv.

TracyLocke, Dallas. Bob Chimbél, pres. — sls promo, materials, merchandising & radio-Pepsi-Lipton Partnership.

South Beach Beverage Co.: 40 Richards Ave., Norwalk, Conn. 06854/Phone: (203) 899-7111. Scott Moffitt, VP & gm; Tom Smallhorn, VP-mktg; Mike Joyce, dir-integrated mktg.

In-house — Sobe: Elixirs, Enlightenment, Exotic teas, Fuel, Ice, Lizz Blizz, Lizard Fuel, Lizard Lightening, Love Bus Brew, Powerline, Sports System, Tsunami.

Jager Di Paola Kemp Design, Burlington, Vt. Kara Fullmer, acct dir. — Sobe Adrenaline Rush.

4 Pfizer

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$212,845	\$153,688	38.5
Sunday magazine	9,292	9,740	-4.6
Newspaper	14,722	3,102	374.7
National newspaper	9,535	3,565	167.5
Outdoor	166	51	226.8
Network TV	442,373	429,083	3.1
Spot TV	29,806	49,666	-40.0
Syndicated TV	84,900	82,813	2.5
Cable TV networks	147,967	140,739	5.1
Network radio	26,400	19,606	34.7
National spot radio	2,223	3,015	-26.3
Internet	11,798	4,303	174.2
Spanish-language TV	16,979	11,422	48.7
Business publications	2,477	3,656	-32.3
Local magazines	8	NA	NA
Measured media	1,011,490	914,446	10.6
Unmeasured media	1,827,003	1,651,718	10.6
Total	2,838,493	2,566,164	10.6
By brand	2003	2002	% chg
Zoloft depression Rx	115,110	50,951	125.9
Viagra impotence Rx	111,618	98,987	12.8
Lipitor cholesterol Rx	109,985	80,169	37.2
Zyrtec allergy Rx	99,009	74,625	32.7
Celebrex arthritis Rx	87,367	81,388	7.3
Listerine mouthwash	78,310	94,243	-16.9
Benadryl allergy remedies	42,304	39,925	6.0
Aricept alzheimers Rx	40,538	29,130	39.2
Sudafed cold & sinus remedies	35,550	35,913	-1.0
Diflucan vaginal yeast Rx	32,425	41,363	-21.6
Pfizer pharmaceuticals	29,894	17,222	73.6
Detrol bladder contron Rx	29,850	39,660	-24.7
Visine eye drops	23,121	21,685	6.6
Rolaids antacid	20,406	18,752	8.8
Zantac heartburn remedies	19,830	23,956	-17.2
Nicotrol smoking remedies	17,577	13,150	33.7
Lubriderm lotion	17,350	37,634	-53.9

U.S. ad spending (\$ in thousands)

By brand	2003	2002	% chg
Rogain hair treatment Rx	15,651	16,694	-6.2
Neosporin antibiotic ointment	15,066	19,458	-22.6
e.p.t. pregnancy tests	13,084	11,459	14.2
Ben Gay ointment	10,137	11,646	-13.0
Pharmacia pharmaceuticals	10,012	5,554	80.3

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$45,188	\$32,373	39.6
Earnings	3,910	9,126	-57.2
U.S.	2003	2002	% chg
Sales	26,844	20,613	30.2
Division sales	2003	2002	% chg
Consolidated	45,188	32,373	39.6
Pharmaceutical	39,631	28,283	40.1
Consumer Healthcare	3,042	2,535	20.0
Animal Health	1,598	1,119	42.8
Corporate/Other	917	436	110.3

Headquarters

Pfizer/235 E. 42nd St., New York, N.Y. 10017/Phone: (212) 573-2323.

Notes

Pfizer acquired Pharmacia Corporation in April 2003 for approximately \$56 billion. In order to focus on its pharmaceuticals business Pfizer sold non-core businesses including Tetra Aquarium Supplies, Schick Wilkinson Sword shaving, Adams USA confectionary and Monsanto agricultural products.

Personnel, brands, agencies

Corporate: Henry A. McKinnell, chmn & CEO; Chuck Hardwick, sr VP-corp affairs.

Berlin Cameron/Red Cell, New York. Andy Berlin, chmn.

Dieste, Harmel & Partners, Dallas. Jaime Gonzalez-Mir, acct dir. — Hispanic adv.

Animal Health Group: 150 E. 42nd St., New York, N.Y. 10017/Phone: (212) 573-2323. S. Pedro Lichtinger, VP & pres-Animal Health Group.

Charleston/Orwig, Hartland, Wis. Lyle Orwig, CEO. — Livestock products.

Rhea & Kaiser Marketing Communications, Naperville, Ill. Kim Cooke, VP & mg super; Diane Martin, VP & mg super. — Large animal.

Pfizer Consumer Healthcare: 201 Tabor Rd., Morris Plains, N.J. 07950/Phone: (973) 385-2000. Marc Robinson, pres; Gordon Knapp, pres. N. Amer.; Paul Sturman, sr VP-mktg- U.S., Canada & Caribbean; Kaki Hinton, VP-adv svcs.

J. Walter Thompson Co., New York. Ellen Hyde, ww dir in charge; Howard Courtemanche, exec VP & N. Amer. bus dir. — Actifed, Anusol, Benadryl franchise, Ben-Gay, Benylin, Cortisone, Desitin, Dramamine, Efferdent, e.p.t., Kaopectate, Listerine, Listerine Essential Care Toothpaste, Listerine Pocket Paks, Ludens, Neosporin franchise, PediaCare, Rolaids, Sinutab, Sudafed, Tucks hemorrhoid aid, Unisom, Visine, Zantac.

BBDO Worldwide, New York. Anne Devereux, exec VP & chief integration officer.

Atmosphere BBDO, New York. Andreas Combuechen, CEO & chief creative officer. — Lubriderm, Nicotrol, Prograine, Rogaine.

CommonHealth. — cons awareness adv.

Pfizer Pharmaceuticals Group: 235 E. 42nd St., New York, N.Y. 10017/Phone: (212) 573-2323. J. Patrick Kelly, pres-US Pharmaceuticals.

Cline Davis & Mann, New York. Carole Di Santo, exec VP & dir-client svcs. — Diflucan.

Merkley & Partners, New York. Peter Fekula, grp acct dir. — Lipitor.

Saatchi & Saatchi Healthcare, New York. Bob Hogan, exec VP & mg dir. — Detrol.

TBWA Health, New York. Victor Imbimbo, acct dir. — Eisai.

McCann Erickson Worldwide, New York. Andrew Schirmer, exec VP. — Bextra.

Arnold Worldwide, New York. Mary Baglivo, pres. — DTC Advertising, Relpax.

Kaplan Thaler Group, New York. Nannette DuFour, grp acct dir. — Zolof, Celebrex.

Berlin Cameron/Red Cell, New York. Andy Berlin, chmn. — Zyrtec.

WPP Health Success, New York. Kathryn Metcalfe. — PR, CV franchise.

Weber Shandwick, New York. Laura Schoen. — PR, Viagra, Bextra, Spiriva, Neurontin, Mirapex.

Ogilvy & Mather Worldwide, New York. Sherry Pudlowski. — PR, Zyrtec.

Edelman, New York. Nancy Turett. — PR, ophthalmology, oncology, Zyvox, Vfend, public affairs.

Burson-Marsteller, New York. Steve Deitsch. — PR, Pregabalin.

Golin/Harris, Chicago. Gail Cowan. — PR, Detrol.

Makovsky & Co., New York. Ken Makovsky. — PR, endocrinology.

Marina Maher Communications, New York. Charry Dumaul; Marina Maher. — PR, Relpax, Depo Provera.

Manning, Selva & Lee, New York. Wendy Lund. —

PR, Celebrex, Aricept, Rebif.

Cohn & Wolfe, New York. Kathryn Metcalfe. — PR, Indiplon.

Chandler Chicco Agency, New York. Judi Kennedy. — PR, Zolof, Xanax XR, Geodon.

Digitas, Boston. Seth Solomons. — relationship mktg, Rebif, Spiriva, Viagra.

Wunderman, New York. Derek Stubbs, sr VP & grp acct dir. — relationship mktg, Pfizer for Living.

LLKFB, New York. Ross Quinn. — relationship mktg, Detrol, Bextra, Celebrex.

Pace, Parsippany, N.J. Nina Wachsmann. — relationship mktg, Xalatan.

Tequila. Deb Piaseczynski, . — relationship mktg, Aricept.

Cline Davis & Mann, New York. — relationship mktg, Caduet.

OgilvyOne Worldwide, New York. Belinda Ward. — relationship mktg, Zolof, Relpax.

izi. Denise D'Agostino. — relationship mktg, Lipitor.

Carat North America, New York. Charles Rutman, pres. — media svcs.

Euro RSCG Life LM&P, New York. Carmine Laliberte, pres; Clare Starrs, VP & mgmt super; Mark Arnold, VP & acct grp super; Heather Breslow, VP & acct grp super; Robert Levine, sr VP & mgmt grp super; Meghan O'Brien, VP & acct super; Jeff Lymburner, sr VP & mgmt super; Grace Felton, sr VP & dir client svcs; Adrian Sansone, sr VP & dir client svcs; Kirk Ornstein, acct super. — Bextra, Dostinex, Dynastat, Genotropin, Inspira, Pregabalin, Somavert.

CommonHealth, Wayne, N.J. Matt Giegerich, pres & CEO-CommonHealth; Guy Dess, pres-Adient (prof). — Listerine (prof), Listerine Pocket Paks (prof), Zantac 75 (prof).

98 Philips Electronics

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$24,882	\$21,555	15.4
Sunday magazine .....	.0	1,110	NA
Newspaper	2,802	379	640.4
National newspaper	2,326	504	361.6
Outdoor	255	57	351.2
Network TV	42,579	32,250	32.0
Spot TV	1,464	2,198	-33.4
Syndicated TV	2,323	3,600	-35.5
Cable TV networks	30,932	27,864	11.0
Network radio .....	.878	17	NA
National spot radio	NA	860	NA
Internet	30,505	20,816	46.5
Business publications	5,900	6,044	-2.4
Measured media	144,845	117,252	23.5
Unmeasured media	173,869	140,746	23.5
Total	318,714	257,998	23.5

By brand	2003	2002	% chg
Philips electronics	63,141	52,870	19.4
Sonicare sonic toothbrush ...	46,072	34,027	35.4
Norelco shaving products ...	29,571	22,906	29.1

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$33,140	\$30,236	9.6
Earnings .....	.793	-3,046	NA

U.S.	2003	2002	% chg
Sales	8,596	8,941	-3.9

Division sales	2003	2002	% chg
Consumer electronics	10,486	9,365	12.0
Medical systems	6,836	6,503	5.1
Semi-conductors	5,692	4,782	19.0
Lighting	5,161	4,604	12.1
Miscellaneous	2,531	2,823	-10.3
Domestic appl/personal care ...	2,432	2,160	12.6

Headquarters

Philips Electronics/Breitner Center, Amstelplein 2, Amsterdam, Netherlands 1096 BC/Phone: 31-20-59-77-777.

Philips Electronics/100 E. 42nd St., New York, N.Y. 10017/Phone: (212) 850-5000.

Personnel, brands, agencies

Corporate: Gerard Kleisterlee, pres & CEO; Andrea Ragnetti, chief mktg officer.

DDB Worldwide Communications, New York. Peter Hempel, mg dir.

Carat North America, New York. Robin Reiner, acct dir. — media svcs, interactive mktg.

Domestic Appliances & Personal Care: 1010 Washington Blvd., Stamford, Conn. 06901/Phone: (203) 973-0200. Johan van Splunter, pres & CEO; Stephen George, sr VP-mktg; Nina Riley, mktg dir-Norelco; Susie Fahey, mgr-creative svcs.

Philips Consumer Electronics: 64 Perimeter Center East, Atlanta, Ga. 30346/Phone: (770) 821-2400. Frans van Houten, CEO -cons electronics bus grps; Rudy Provoost, CEO-cons electronics global sls; Eric Plaskonos, VP-adv.

Philips Lighting Co.: 200 Franklin Square Dr., P.O. Box 6800, Somerset, N.J. 08875-6800/Phone: (800) 555-0050. Theo van Deursen, pres & CEO; Mark Roush, VP-strategic mktg; Rick Bodge, media dir.

2 Procter & Gamble Co.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$582,263	\$498,977	16.7
Sunday magazine	27,972	32,498	-13.9
Newspaper	47,082	20,413	130.6
National newspaper	7,270	3,985	82.4
Outdoor	5,324	7,197	-26.0
Network TV	833,636	723,734	15.2
Spot TV	133,787	85,876	55.8
Syndicated TV	329,161	217,807	51.1
Cable TV networks	514,573	386,277	33.2
Network radio	25,549	24,799	3.0
National spot radio	11,818	16,752	-29.4
Internet	13,457	17,273	-22.1
Spanish-language TV	145,792	117,358	24.2
Business publications	6,747	6,846	-1.4
Local magazines	5	78	-93.1
Measured media	2,684,438	2,159,870	24.3
Unmeasured media	638,295	513,566	24.3
Total	3,322,733	2,673,436	24.3
By brand	2003	2002	% chg
Crest dental products	270,412	176,681	53.1
Clairol hair products	235,585	161,846	45.6
Olay skin care products	210,260	163,534	28.6
Pantene hair products	175,480	112,532	55.9
Cover Girl cosmetics	125,242	117,287	6.8
Swiffer floor cleaner	91,942	64,848	41.8
Bounty paper prods	82,846	79,940	3.6
Tide laundry detergent	77,181	86,786	-11.1
Tampax tampons	75,922	36,306	109.1
Pampers disposable diapers	75,528	71,089	6.2
Iams pet food	71,384	40,324	77.0
Dawn dishwashing liquid	66,929	28,434	135.4
Always feminine products	57,490	44,901	28.0
Downy fabric softener	54,613	49,970	9.3
Theracare feminine products	53,542	64,592	-17.1
Old Spice personal prods	51,742	60,706	-14.8
Charmin bathroom tissue	49,380	47,069	4.9
Mr. Clean household cleaners	49,353	24,321	102.9
Max Factor cosmetics	42,014	41,299	1.7
Febreze fabric refresher	41,860	25,986	61.1
Pur water filter system	40,812	38,122	7.1
Sunny Delight fruit drinks	39,444	15,340	157.1
Head & Shoulders shampoo	37,987	37,712	0.7
Cascade dishwashing det	37,614	28,710	31.0
Secret anti-persp & deod	36,458	39,319	-7.3
Pringles snacks	35,597	31,698	12.3
Folgers coffee	32,923	30,221	8.9
Nyquil cold & sinus remedies	32,533	29,495	10.3
Prilosec OTC antacid	32,403	0	NA
Luvs disposable diapers	31,458	23,531	33.7
Metamucil laxative	31,307	14,630	114.0
Procter & Gamble products	27,116	14,974	81.1
Gain laundry detergent	26,497	27,086	-2.2
Bounce fabric softener	26,341	21,739	21.2
Pepto-Bismol antacid	23,580	22,613	4.3

U.S. ad spending (\$ in thousands)

By brand	2003	2002	% chg
Infusium hair care products	22,444	9,642	132.8
Physique hair care products	19,395	25,789	-24.8
Puffs facial tissue	18,070	26,263	-31.2
Millstone coffee	18,070	22,313	-19.0
Cheer laundry detergent	16,746	24,315	-31.1
Sure anti-persp & deodorant	15,873	6,367	149.3
Dayquil cold & flu remedy	15,304	15,352	-0.3
Fixodent denture adhesive	14,635	10,555	38.6
Vicks cold & sinus remedies	14,097	15,044	-6.3
Zest soap	13,917	6,963	99.9
Noxzema skin care prods	13,726	8,630	59.1

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$43,377	\$40,238	7.8
Earnings	5,186	4,352	19.2
U.S.	2003	2002	% chg
Sales	21,853	21,198	3.1
Pre-tax income	4,920	4,411	11.5
Division sales	2003	2002	% chg
Fabric & home care	12,560	11,618	8.1
Beauty care	12,221	8,079	51.3
Baby, feminine & family care	9,933	11,877	-16.4
Health care	5,796	4,979	16.4
Food & beverage	3,238	3,801	-14.8

Headquarters

Procter & Gamble Co./1 Procter & Gamble Plaza, Cincinnati, Ohio 45202/Phone: (513) 983-1100.

Notes

P&G bought Wella, the German hair-care company, in August 2003 for \$5.7 billion, its biggest purchase to date. That same month it sought to acquire Hamburg-based Beiersdorf AG, maker of Nivea skin products, but Beiersdorf remained under control of Tchibo, a coffee-to-retail group. P&G in mid-2003 explored the sale of Sunny Delight and Puna juice (Europe). Both have had declining sales and market shares. In May 2004, P&G paid \$1.8 billion in acquiring the 20% it didn't already own in its China joint venture from partner Hutchison Whampoa China Ltd. P&G reduced its number of reporting segments from five to three in 2004. The three: beauty care; health, baby and family care; health-care (also includes food unit). P&G agreed to buy the European laundry detergent brands from Colgate-Palmolive Co. in October 2003. No purchase price was disclosed. The brands include Axiom in France, Dynamo in Denmark, Dinamo in Italy, Ajax in Sweden and Gama in France. The deal did not involve facilities or employees. C-P is concentrating on its oral and personal care businesses.

Personnel, brands, agencies

Corporate: A.G. Lafley, chmn, pres & chief exec; R. Kerry Clark, vice chmn & pres-global market devel bus opers; Bruce L. Byrnes, vice chmn & pres-global beauty, feminine care & global health-care; James R. Stengel, global mktg officer; Ted Woehrl, VP-mktg N. Amer.

Grey Worldwide, New York. Neil Kreisberg, grp exec VP, exec mg dir. — Cover Girl, Downy, Febreze, Joy, Pantene, Pringles, Sure, Torenos, Zest.

Kaplan Thaler Group, New York. Joanne Miserandino, global acct dir. — Dawn, Swiffer.

Leo Burnett Worldwide, Chicago. Catherine Guthrie, exec VP & mg dir. — Always, Max Factor, Noxzema, Pert Plus, Secret anti-perspirant, Tampax, Vidal Sassoon.

Medicus, New York. Sherri Goldstein, sr VP, grp acct dir; Lisa Ebert, sr VP, grp acct dir; Kathy Magnuson, sr VP, grp acct dir. — Intrinsa, Metamucil, oral care franchise, Prilosec OTC, ThermaCare (prof).

Publicis Worldwide, New York. Gail Hollander, exec VP, global equity dir-P&G healthcare brands; Angela Pasqualucci, exec VP, global equity dir-P&G family brands. — Bounty, Charmin, DayQuil, Metamucil, NyQuil, NyQuil cough, Pepto-Bismol, Prilosec, Puffs, ThermaCare, Vicks, Vicks VapoRub (cons).

Saatchi & Saatchi, Los Angeles. Chuck Maguy, acct dir; Chip Ross, acct super. — Pur water filtration systems.

Saatchi & Saatchi, New York. Scott Gilbert, co-CEO; Keith Bunnell, global equity dir-beauty care; Vaughan Emsley, global equity dir-health care & baby; Marie McNeely, global equity dir-fabric & home; Carol Miller-Repetto, global equity dir-health care; Jane Quelch, global equity dir-health care; Mariana Sanchez, global equity dir-health care. — Cascade, Cascade Complete, Lemon Scented Cascade, Liquid Cascade, Crest Healthy Smiles 2010 prog, Crest new prods, Crest Night Effects, Crest plus Scope, Crest toothbrushes, Crest toothpaste, Crest Whitestrips, Dreft, Eukanuba pet food, Fixodent, Folgers, Head & Shoulders, Iams pet food, Luvs, Millstone, Olay personal care cleansing prods, Olay skin care prods, Olay Vitamins, Old Spice deodorant & fragrance, Old Spice soap, Pampers, Plastic Booster, Safeguard, Scent Expression, Scope, Sunny Delight, Tide, Tide Clean Breeze, Tide Liquid, Tide Mountain Spring, Tide Unscented, Tide with Bleach.

Starcom MediaVest, New York & Chicago. Richard Beaven, mg dir. — media svcs.

MediaCom, New York. Harvey Goldhersz, exec dir ww. — media plng, Actonel, Cover Girl, Downy, Febreze, Giorgio/Beverly Hills fine fragrances, Joy, Mr. Clean, Pantene, Pringles, Sure.

Bromley Communications, San Antonio. Linda L. Aguayo, acct dir. — Hispanic adv, Always, Bounty, Charmin, Dawn, DayQuil, NyQuil, Pepto-Bismol, Vicks VapoRub.

Burrell Communications Group, Chicago. Yvette Fisher, sr VP acct mgmt dir; George Adkins, acct dir. — African-American adv, Always, Bounty, Charmin, Crest, Folgers, Gain, Luvs, Pampers, Tampax, Tide.

Conill, New York. Sean Patrick, acct dir; Andrea Diquez, acct dir. — Hispanic adv, Crest, Dreft, Head & Shoulders, Olay, Old Spice, Pampers, Tide.

WING Latino Group, New York. Gloriana Lopez-Lay, VP, grp dir, acct mgr. — Hispanic adv, Downy, Pantene, Torengos, Zest.

Clairol: 1 Blachley Rd., Stamford, Conn. 06922/Phone: (203) 357-5000. Rob Matteucus, pres.

Grey Worldwide, New York. Gloria Appel, exec VP & mg ptr. — Clairol, Hydrience, Natural Instincts, Nice 'n Easy, Ultress.

Kaplan Thaler Group, New York. Robin Koval, chief mktg officer & gm. — Aussie, Daily Defense, Herbal Essences, Infusium 23, Renewal 5X.

Wunderman, New York. Amanda Rangaiah, VP, acct dir. — direct mktg.

87 Reckitt Benckiser

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$113,912	\$105,898	7.6
Sunday magazine	2,887	1,082	166.9
Newspaper	1,062	142	645.9
National newspaper	138	NA	NA
Network TV	59,869	49,770	20.3
Spot TV	20,100	16,055	25.2
Syndicated TV	20,901	8,116	157.5
Cable TV networks	76,204	52,816	44.3
Network radio	842	NA	NA
National spot radio	931	1,528	-39.1
Internet	200	637	-68.7
Spanish-language TV	1,081	4,772	-77.3
Business publications	1,572	1,833	-14.3
Local magazines	29	NA	NA
Measured media	299,727	242,650	23.5
Unmeasured media	93,052	75,332	23.5
Total	392,779	317,982	23.5

By brand	2003	2002	% chg
Lysol cleaners	46,414	52,938	-12.3
Airwick air freshener	30,238	11,439	164.3
Spray 'n Wash stain remover ..	22,103	4,229	422.6
Adidas fragrance	19,738	13,770	43.3
Electrasol dishwasher det ...	18,897	6,922	173.0
Neutra air freshener	15,532	0	NA
French's mustard	13,523	10,037	34.7
Stetson fragrance	11,510	6,086	89.1
Veet toiletries	10,254	9,289	10.4

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$6,109	\$5,090	20.0
Earnings	1,117	849	31.6
North America	2003	2002	% chg
Sales	1,675	1,543	8.6
Operating Profit	306	265	15.5
Division sales	2003	2002	% chg
Household, health & pers prods ..	5,790	4,800	20.6
Food	319	290	10.0

Headquarters

Reckitt Benckiser/103-105 Bath Rd., Sloth, Berkshire, U.K. SL1 3UH/Phone: +44 (0) 1753 217 800.

Reckitt Benckiser North America/Morris Corporate Center IV, 399 Interpace Pkwy., Parsippany, N.J. 07054-0225/Phone: (973) 404-2829.

Personnel, brands, agencies

Corporate: Bart Becht, CEO; Javed Ahmed, pres-N. Amer. Household; Elliott Penner, pres-N. Amer. Food.

MPG, New York. Mike Haggerty, exec VP & mg dir. — media buying.

Reckitt Benckiser North America: Morris Corporate Center IV, 399 Interpace Pkwy., Parsippany, N.J. 07054-0225/Phone: (973) 404-2829. Javed Ahmed, pres-N. Amer. Household; Elliott Penner, pres-N. Amer. Food.

Euro RSCG Worldwide, New York. Marty Susz, ptr & grp acct dir. — Air Wick, d-Con, Electrasol, Finish, Frank's RedHot

sauce, French's Mustard, French's GourMayo, French's French Fried Onions, Jet Dry, Resolve, Spray n' Wash, Woolite.

J. Walter Thompson Co., New York. Ellen Hyde, dir in charge. — Easy-Off, Glass Plus, Lime-A-Way, Lysol, Mop & Glo, Old English, Rid-X, Veet.

EastWest Creative, New York. Ed Catto, grp acct dir. — Lysol, Old English, Electrosol, Jet Dry, Veet.

MPG, New York. Mike Haggerty, exec VP & mg dir. — media svcs.

Al Punto, Tustin, Calif. Peggy Goff, dir-strategic plng. — Hispanic adv.

Source Marketing, Westport, Conn. Randy Musiker, VP. — sls promo, implementation, French's Mustard, French's GourMayo, French's Worcestershire Sauce, French's French Fried Onions, French's Potato Sticks, Frank's RedHot, Cattlemens, Freakin' Nuts, AirWick, Spray 'n Wash, Woolite, Cling Free, Resolve, Vivid, Yes, Easy Off, Glass Plus, Mop & Glo, Lime-a-way, d-Con, Chore Boy.

77 SABMiller

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$23,451	\$18,610	26.0
Newspaper	6,061	959	532.1
National newspaper	177	128	38.2
Outdoor	26,444	31,193	-15.2
Network TV	92,726	117,840	-21.3
Spot TV	24,496	31,061	-21.1
Syndicated TV	2,172	2,428	-10.5
Cable TV networks	42,408	41,793	1.5
Network radio	531	NA	NA
National spot radio	1,112	2,063	-46.1
Internet	15,822	7,244	118.4
Spanish-language TV	35,927	34,380	4.5
Business publications	1,046	788	32.7
Local magazines	NA	19	NA
Measured media	272,372	288,504	-5.6
Unmeasured media	160,497	170,003	-5.6
Total	432,869	458,508	-5.6
By brand	2003	2002	% chg
Miller beers	255,745	245,076	4.4

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$12,645	\$8,984	40.8
Earnings	645	296	117.9
North America	2003	2002	% chg
Sales	4,778	3,408	40.2
Operating profit	189	75	152.0

Headquarters

SABMiller/1 Stanhope Gate, London, United Kingdom W1K 1AF/Phone: 44 20 7659 0100.

SABMiller/3939 W. Highland Blvd., Milwaukee, Wis. 53201/Phone: (414) 931-2000.

Notes

SABMiller became the new name for SAB (South African Breweries plc) when it bought a majority stake in Miller Brewing Co. in 2002 from Altria Group. As a result of the divestiture, Altria owns about a third of SABMiller. Financials, preliminary unaudited results for the fiscal year ended March 31, 2004, include

nine months of Miller in the prior year. SABMiller is the No. 2 brewer in the world.

Personnel, brands, agencies

Corporate: Graham Mackay, CEO.

Miller Brewing Co.: 3939 W. Highland Blvd., Milwaukee, Wis. 53201/Phone: (414) 931-2000. Norman Adami, pres & CEO; Robert Mikulay, exec VP-mktg; Douglas Brodman, sr VP sls & distribution; Erv Frederick, VP & gm-Miller Trademark unit; Steve Buerger, grp dir-mktg svcs; Ed Gawronski, VP-mkt & bus insights.

Ogilvy & Mather Worldwide, New York. Rick Roth, sr ptner & ww client svcs dir. — Miller Trademark, Pilsner Urquell.

Wieden & Kennedy, Portland, Ore. Ken Smith, acct dir. — Miller High Life, Miller Trademark.

Starcom MediaVest, Chicago. Chris Boothe, acct dir; Kathy Dillon, acct dir. — media buying.

Agency.com, San Francisco. Bill Brock, acct exec. — interactive mktg.

Bravo Group, New York. Jose Arandia, VP-grp acct dir. — Miller Trademark Hispanic adv.

GMR Marketing, Milwaukee. Todd Marble, acct dir. — sports & event mktg.

Lambesis, Carlsbad, Calif. Amy Jealous, acct dir. — SKYY Blue, SKYY Sport.

Promotion Network, Chicago. Amy Jealous, acct exec. — sls promo.

Schupp Company, St. Louis. Mark Schupp, acct super. — sls promo.

Square One, Dallas. Jesse Bayer, acct dir. — Icehouse.

Team Enterprise, Cooper City, Fla. Dan Gregory, pres. — Promo.

Zipatoni Co., St. Louis. Bryce McTavish, ptner. — sls promo.

61 Safeway

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$1,774	\$868	104.5
Newspaper	27,337	34,466	-20.7
Outdoor	1,999	159	NA
Spot TV	24,670	20,193	22.2
Cable TV networks	47	13	273.0
National spot radio	50,856	15,431	229.6
Internet	282	208	35.5
Local magazines	7	126	-94.1
Measured media	106,971	71,461	49.7
Unmeasured media	426,296	284,784	49.7
Total	533,267	356,245	49.7
By brand	2003	2002	% chg
Safeway grocery stores	64,146	38,278	67.6
Vons food stores	11,767	12,934	-9.0
Randalls food stores	10,622	2,579	311.9

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$35,553	\$34,767	2.3
Earnings	-170	-828	NA
U.S.	2003	2002	% chg
Sales	31,509	31,291	0.7

Headquarters

Safeway/5918 Stoneridge Mall Rd., Pleasanton, Calif. 94588-3229/Phone: (925) 467-3000.

Personnel, brands, agencies

Corporate: Steven A. Burd, chmn, pres & CEO; Brian Cornell, exec VP & chief mktg officer; Michael Minasi, sr VP-mktg; Barbara Walker, VP-adv & mktg.

Dailey & Associates, Los Angeles. Megan Birsthite, exec VP & mgmt super. — Safeway, Vons, Dominick's, Carrs, Randalls, Tom Thumb, Pavilions, Genuardi's.

Berlin Cameron/Red Cell, New York. William Growgin, pres. — creative projects.

Castells & Asociados Advertising, Los Angeles. Stan Levinson, acct dir. — Hispanic adv.

56 Sara Lee Corp.**U.S. ad spending (\$ in thousands)**

By media	2003	2002	% chg
Magazine	\$43,518	\$56,662	-23.2
Sunday magazine	1,424	1,085	31.3
Newspaper	695	1,244	-44.1
Outdoor	398	163	143.4
Network TV	56,929	48,657	17.0
Spot TV	4,735	18,163	-73.9
Syndicated TV	31,197	37,379	-16.5
Cable TV networks	47,027	32,723	43.7
National spot radio	869	3,638	-76.1
Internet	800	1,020	-21.6
Spanish-language TV	6,448	NA	NA
Business publications	1,965	2,680	-26.7
Local magazines	19	NA	NA
Measured media	196,024	203,414	-3.6
Unmeasured media	386,717	401,297	-3.6
Total	582,741	604,711	-3.6

By brand	2003	2002	% chg
Hanes underwear	50,448	59,146	-14.7
Sara Lee packaged foods	35,211	20,980	67.8
Jimmy Dean bacon & sausage	25,285	26,507	-4.6
Hillshire Farm packaged meats	16,307	19,330	-15.6
Playtex women's underwear	13,477	6,259	115.3
Champion sportswear	12,380	3,483	255.5
Ball Park hot dogs	11,909	16,122	-26.1
Just My Size women's apparel	10,414	6,630	57.1

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$18,291	\$17,628	3.8
Earnings	1,221	1,111	9.9

U.S.	2003	2002	% chg
Sales	10,662	10,768	-1.0

Division sales	2003	2002	% chg
Intimates/underwear	6,399	6,455	-0.9
Meats	3,746	3,704	1.1
Baked goods	3,276	2,976	10.1
Beverages	2,756	2,539	8.5
Household prods	2,118	1,962	8.0

Headquarters

Sara Lee Corp./3 First National Plaza, Chicago, Ill. 60602-4260/Phone: (312) 726-2600.

Personnel, brands, agencies

Corporate: C. Steven McMillan, chmn & CEO; Brenda Barnes, pres & chief operating officer; Robert Fellows, VP-brand equity devel.

Starcom, Chicago. Deb Medsker, VP, media dir; Natalie Conway, media dir. — TV & print.

Sara Lee Bakery: 8400 Maryland Ave., St. Louis, Mo. 63105/Phone: (314) 259-7000. Rich Noll, CEO; Peter Reiner, sr VP-mktg & rsch & devel.

Publicis Worldwide, Dallas. Bill Brunt, sr VP, grp acct dir; Laurie Cluck, VP, mgmt super. — Colonial, Earth Grains, Grants Farm, Iron Kids, Rainbo, Sara Lee.

Starcom, Chicago. Deb Medsker, VP, media dir; Natalie Conway, media dir. — media svcs.

Sara Lee Coffee & Tea North America: 500 Mamaronek Ave., Harrison, N.Y. 10528/Phone: (212) 532-0300. Aldo Uva, pres; Philippe Schaille, VP-mktg.

BBDO Worldwide, Chicago. Stacie Boney, exec VP & client svc dir. — Chock Full o' Nuts, Hills Bros, MJB.

Campbell Mithun, Chicago. Maggie Reynolds, acct super. — Superior.

Starcom, Chicago. Deb Medsker, VP, media dir; Natalie Conway, media dir. — media svcs, Chase & Sanborn, Chock Full o' Nuts, Hills Bros.

Sara Lee Household & Body Care USA: 707 Eagleview Blvd., Exton, Pa. 19341/Phone: (610) 321-1220. Andrea Niessner, pres; Dominic Gentile, VP-mktg.

Grey Worldwide, New York. Ken Dowling, exec VP-acct mgmt. — Ambi-Pur, Kiwi shoe care.

Starcom, Chicago. Deb Medsker, VP, media dir; Natalie Conway, media dir. — media svcs, Ambi-Pur, Kiwi.

Sara Lee Intimates & Underwear: 1000 E. Hanes Mill Road, Winston-Salem, N.C. 27105/Phone: (336) 519-8080. Lee Chaden, exec VP-Sara Lee corp & CEO-Sara Lee branded apparel; Mike Flatow, CEO-intimates & hosiery; Sidney Falken, Hanes brand Champion; Tolli Love, dir-mktg Bali, Barely There & Wonderbra; Tracey Goodwin, VP & gm-Hanes Her Way & Lovable Bras; Shelley Rider, VP-mktg Sara Lee casualwear & Just My Size; Nadine Hall, VP mktg-Leggs & Hanes hosiery; Debbie May, VP-mktg Playtex; Gerald Evans, CEO-Sara Lee underwear & casualwear; Ed Kivett, VP-mktg Sara Lee socks; Steve Lineberger, pres-Sara Lee underwear & socks; Lisa Purcell, VP-mktg Sara Lee underwear; Mike Reed, dir-mktg Hanes Beefy-T; Larry French, VP-mktg Champion; Heather Stefani, VP-mktg & dir-Champion jogbra.

Agencies assigned on a project basis. — Hanes silk reflections, L'eggs.

Henderson Bromstead Art Co., Winston-Salem, N.C. Hayes Henderson, pres; Brad Bromstead, dir-mktg & client svcs. — Hanes Beefy-T, Lovable.

In-house. — Donna Karan hosiery.

KraftWorks, New York. Neal Kraft, pres. — Bali, Barely There, Playtex apparel, Wonderbra.

Martin Agency, Richmond, Va. John Adams, chmn & CEO; Bruce Kelley, vice chmn. — Hanes.

Publicis Worldwide, Dallas. Jill Rosenfeld, VP, mgmt super. — Champion, Just My Size.

Starcom, Chicago. Deb Medsker, VP, media dir; Natalie Conway, media dir. — media svcs, Bali, Barely There, Playtex.

Lapiz Integrated Hispanic Marketing, Chicago. Delores Kunda, pres & CEO. — Hispanic adv, Hanes.

Sara Lee Packaged Meats: 1051 Carver Rd., Cincinnati, Ohio 45242/Phone: (513) 936-2000. Bob Kopriva, CEO-Sara Lee foods ww; Ellen Turner, pres-Sara Lee foods retail; Jim Ruehlmann, sr VP-Ball Park; Tara Koury, sr VP-Hillshire Farm; Debbie Viacherelli, VP-mktg Bryan Foods, Hillshire Farm & Kahns; Vickie Neff, VP-mktg Jimmy Dean; Divina Williams, VP-mktg Sara Lee Deli.

Element 79 Partners, Chicago. Brian Williams, CEO. — Hillshire Farm.

Grey Worldwide, San Francisco. Richard Popko, sr VP & mgmt representative. — Galileo.

Publicis Worldwide, Dallas. Bill Brunt, sr VP, grp acct dir; Laurie Cluck, VP, mgmt super. — Sara Lee deli.

TBWA Worldwide, Los Angeles. Rob Schwartz, exec creative dir; Corey Mitchell, acct dir. — Ball Park, Jimmy Dean.

Starcom, Chicago. Deb Medsker, VP, media dir; Natalie Conway, media dir. — media svcs, Ball Park, Jimmy Dean, State Fair, Sara Lee meats.

SpotPlus, Dallas. Jennie Fuller, media dir; Michelle Garland, buying super. — media buying, Bryan Foods.

15 SBC Communications

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$7,257	\$10,015	-27.5
Sunday magazine	34	52	-34.2
Newspaper	414,355	294,141	40.9
National newspaper	27,296	15,751	73.3
Outdoor	8,142	14,473	-43.7
Network TV	110,314	100,706	9.5
Spot TV	233,386	154,852	50.7
Syndicated TV	20,860	343	NA
Cable TV networks	42,015	28,909	45.3
Network radio	578	495	16.6
National spot radio	144,217	108,653	32.7
Internet	12,529	9,178	36.5
Yellow Pages	6,991	2,979	134.7
Spanish-language TV	9,156	7,247	26.4
Business publications	594	1,871	-68.3
Local magazines	39	20	93.5
Measured media	1,037,761	749,684	38.4
Unmeasured media	473,255	341,882	38.4
Total	1,511,016	1,091,566	38.4
By brand	2003	2002	% chg
Cingular wireless phone svc ..	644,969	518,914	24.3
SBC telecommunications ...	360,771	124,158	190.6
Southwestern Bell telecom ...	13,406	31,694	-57.7

Sales & earnings (\$ in millions)

Worldwide & U.S.	2003	2002	% chg
Sales	\$40,843	\$43,138	-5.3
Earnings	8,505	5,653	50.5
Division sales	2003	2002	% chg
Voice	22,134	24,752	-10.6
Data	10,150	9,639	5.3
Directory advertising	4,317	4,504	-4.2
Long-distance voice	2,561	2,324	10.2
Other	1,681	1,919	-12.4

Headquarters

SBC Communications/175 E. Houston St., San Antonio, Texas 78205/Phone: (210) 821-4105.

Notes

In February 2004, Cingular Wireless agreed to buy AT&T Wireless for \$41 billion. If the deal goes through, Cingular is expected to phase out the 118-year-old AT&T name. Cingular is 60% owned by SBC Communications and 40% by BellSouth Corp.

Personnel, brands, agencies

Corporate: Edward E. Whitacre Jr., chmn & CEO; William M. Daley, pres; Rick Welday, Jr., VP-adv; Scott Helbing, sr VP-cons mktg; Karen Jennings, sr exec VP-HR & corp comms.

GSD&M, Austin, Texas. Bo Bradbury, VP & acct dir. — consumer adv, media buying, SBC telecommunications, Southwestern Bell telecommunications, Ameritech telecommunications.

Merkley & Partners, New York. Lou Killeffer, chief mktg officer. — brand adv.

Dieste, Harmel & Partners, Dallas. David Ravelo, dir-client svcs. — Hispanic adv.

Marketing Arm, Dallas. Chris Smith, chief strategy officer. — sports mktg.

PanCom, Los Angeles. Ferdie Gonzalez, acct dir. — Asian-American adv.

Javelin Direct, Dallas. Greg Banks, mg dir. — direct mktg.

Rodgers Townsend, St. Louis. Gary Shipper, acct dir. — business to business adv.

Cingular Wireless: 5565 Glenridge Connector, Atlanta, Ga. 30342/Phone: (404) 236-6000. Randall L. Stephenson, chmn; Stan Sigman, pres & CEO; Marc Lefar, chief mktg officer; Darryl W. Evans, VP-adv; Vance Overbey, exec dir-adv; Jean Copeland, dir-adv; Bethann Kushner, dir-adv; Charlie Payne, dir-media.

BBDO Worldwide, Atlanta & New York. Rob Cherof, mgmt dir. — Cingular wireless phone service.

OMD Worldwide, Atlanta. Dale Travis, dir. — media buying.

Mendoza Dillon & Asociados, Irvine, Calif. — Hispanic adv.

Targetbase, Irving, Texas. David Scholes, pres & CEO. — direct mktg.

Ant Farm Interactive, Atlanta. — interactive mktg.

54 Schering-Plough Corp.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$44,270	\$57,874	-23.5
Sunday magazine	NA	3,835	NA
Newspaper	19	2,061	-99.1
National newspaper	NA	2,791	NA
Outdoor	67	1,193	-94.4
Network TV	148,009	114,179	29.6
Spot TV	8,662	2,978	190.9
Syndicated TV	17,520	915	NA
Cable TV networks	40,706	28,054	45.1
Network radio	3,626	5,812	-37.6
National spot radio	1,949	191	922.2
Internet	3,868	3,810	1.5
Business publications	426	634	-32.7
Measured media	269,122	224,326	20.0
Unmeasured media	339,857	283,287	20.0
Total	608,979	507,613	20.0

By brand	2003	2002	% chg
Clarinet allergy Rx	106,299	133,221	-20.2
Claritin allergy Rx	89,713	3,915	2191.2
Dr. Scholl's footcare products	35,783	30,145	18.7

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$8,334	\$10,180	-18.1
Earnings	-92	1,974	NA
U.S.	2003	2002	% chg
Sales	3,559	5,761	-38.2
Division sales	2003	2002	% chg
Prescription Pharmaceuticals	6,672	8,788	-24.1
Consumer Health Care	965	715	35.0
Animal Health	697	677	3.0

Headquarters

Schering-Plough Corp./2000 Galloping Hill Rd., Kenilworth, N.J. 07033/Phone: (908) 298-4000.

Notes

In June 2004, Schering-Plough announced that it will be reviewing its estimated \$400 million global marketing budget in an attempt to consolidate its business with one ad holding company. Schering-Plough's decline in revenue is largely the result of its moving its allergy drug Claritin from DTC to OTC in December 2002 when it lost its patent protection. As an indication, S-P's allergy and respiratory segment reported net sales of \$2 billion in 2003 vs. \$3.3 billion in 2002 and \$4.22 billion in 2001.

Personnel, brands, agencies

Corporate: Fred Hassan, chmn & CEO; Carrie Cox, exec VP & pres-global pharmaceuticals; Herb Ehrenthal, VP-cons comms.

Schering-Plough Healthcare Products Division: 3 Connell Dr., Berkeley Heights, N.J. 07922/Phone: (908) 679-1640. Stanley Barshay, chmn-Consumer Health Care; James Mackey, sr VP-sales & mktg; Stephen Neumann, VP-mktg svcs; Chris Meringolo, dir-media svcs/pr.

BBDO Worldwide, New York. Anne Devereux, exec VP & chief integration officer. — Nasonex.

CommonHealth, Parsippany, N.J. Matt Giegerich, pres & CEO-CommonHealth; David Chapman, pres-Thomas Ferguson Associates, (a CommonHealth co.) (prof). — Clarinet.

Euro RSCG Worldwide, New York. Marty Susz, ptrn & gr acct dir. — A&D Ointment, Afrin, Coppertone, Coricidin, Dr. Scholl's, Lotrimin, Tinactin.

Ogilvy & Mather Worldwide, New York. Michael Guarini, exec grp dir. — Claritin.

MPG, New York. Mike Haggerty, exec VP & mg dir. — media svcs, Afrin, A&D, Claritin, Coopertone, Coricidin, Dr. Scholl's, Lotrimin, Tinactin.

Zenith Media, New York. JoAnn Accarino, sr VP & assoc comms dir. — media buying, Claritin, Dr. Scholl's, Tinactin, Lotrimin, Coppertone, Afrin, Coricidin.

Reynardus & Moya Advertising, New York. Jorge Reynardus, ptrn. — Hispanic adv, Claritin.

12 Sears, Roebuck & Co.**U.S. ad spending (\$ in thousands)**

By media	2003	2002	% chg
Magazine	\$47,704	\$68,283	-30.1
Sunday magazine	45,348	31,643	43.3
Newspaper	123,032	128,459	-4.2

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
National newspaper	589	601	-2.0
Outdoor	816	1,467	-44.4
Network TV	210,229	224,420	-6.3
Spot TV	48,385	49,672	-2.6
Syndicated TV	29,713	40,121	-25.9
Cable TV networks	109,187	104,468	4.5
Network radio	13,936	19,855	-29.8
National spot radio	6,030	7,042	-14.4
Internet	14,818	9,755	51.9
Yellow Pages	14,964	14,714	1.7
Spanish-language TV	120,470	97,841	23.1
Business publications	534	626	-14.8
Local magazines	48	89	-45.6
Measured media	785,803	799,057	-1.7
Unmeasured media	847,830	862,129	-1.7
Total	1,633,633	1,661,186	-1.7
By brand	2003	2002	% chg
Sears department stores	627,322	631,033	-0.6
Kenmore appliances	54,564	49,727	9.7
Craftsman tools	35,282	39,211	-10.0
Lands' End apparel	26,448	24,728	7.0
Great Indoors home store	12,927	19,377	-33.3
Orchard Supply hardware	12,227	10,438	17.1

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$41,124	\$41,366	-0.6
Earnings	3,397	1,376	146.9
U.S.	2003	2002	% chg
Sales	36,643	37,180	-1.4
Operating income	1,036	2,065	-49.8
Division sales	2003	2002	% chg
Retail & related	31,842	31,459	1.2
Sears Canada	4,481	4,189	7.0
Credit & financial prods	4,429	5,392	-17.9
Corp & other	372	326	14.1

Headquarters

Sears, Roebuck & Co./3333 Beverly Rd., Hoffman Estates, Ill. 60179/Phone: (847) 286-2500.

Notes

Sears sold its credit card portfolio to Citigroup in July 2003 for about \$3 billion. The deal includes Sears' private-label cards and co-branded MasterCard, and leaves Sears as solely a retailer. The unit was the nation's eighth largest portfolio with 590 million accounts and outstanding loan balances of \$29 billion. Sears in September 2003 purchased rights to the Structure label from Limited Brands for about \$10 million, and inaugurated its Sears Grand off-mall concept in Salt Lake City on Oct. 11, 2003. Sears Grand concepts are being located closer to where people live rather than in malls. They largely target middle-income families in mid-sized communities (100,000-150,000 households) that don't have regional malls. Larger than a traditional Sears store, they combine the full lines of a traditional Sears store but add convenience-type products like milk, frozen pizzas, custom paint mixing, photography and a cafe.

Personnel, brands, agencies

Corporate: Alan J. Lacy, chmn & CEO.

Lands' End: Lands' End Ln., Dodgeville, Wis. 53595/Phone: (608)935-9341. Mindy Meads, pres & CEO.

McKinney & Silver, Raleigh, N.C. Ted Gilvar, acct dir; Anna Griffin, acct mgmt super.

Sears, Roebuck & Co.: 3333 Beverly Rd., Hoffman Estates, Ill. 60179/Phone: (847) 286-2500. Janine Bousquette, exec VP & chief customer & mktg officer; Rebecca J. Case, VP-adv & creative svcs.

Ogilvy & Mather Worldwide, Chicago. Linda Garrison, mg dir. — Craftsman, Die Hard, Kenmore, Orchard supply hardware, Sears Auto centers.

Y&R Advertising, Chicago. Kary McIlwain, pres & CEO-Y&R Chicago. — Sears brands, The Great Indoors.

MindShare Worldwide, New York & Chicago. Bruce Smith, mg dir. — media svcs.

Bravo Group, New York. Linda DeJesus-Cutler, pres. — media svcs, Hispanic print & bdcast, creative devel.

Burrell Communications Group, Chicago. Fay Ferguson, mg dir; L.T. Cushon Dillard, VP acct dir. — African-American adv, targeted media buying.

Circulation Experti, New York. Garrison Jackson, pres & CEO. — African-American newspaper plng & buying.

Kang & Lee, New York. Cynthia Park, exec VP. — Asian-American adv.

Newspaper Services of America, Chicago. Scott Harding, CEO. — newspaper buying.

TMP Worldwide, Chicago. Stuart McKelvey, CEO. — directory adv buying.

9 Sony Corp.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$81,702	\$70,094	16.6
Sunday magazine	4,713	1,345	250.3
Newspaper	133,026	112,568	18.2
National newspaper	33,977	41,963	-19.0
Outdoor	11,328	11,078	2.3
Network TV	338,013	303,842	11.2
Spot TV	80,889	101,741	-20.5
Syndicated TV	41,660	42,649	-2.3
Cable TV networks	165,973	116,622	42.3
Network radio	1,687	4,377	-61.4
National spot radio	14,249	21,677	-34.3
Internet	26,024	29,672	-12.3
Spanish-language TV	28,667	7,348	290.2
Business publications	41,704	31,491	32.4
Local magazines	127	123	3.1
Measured media	1,003,739	896,588	12.0
Unmeasured media	811,047	724,466	12.0
Total	1,814,786	1,621,054	12.0
By brand	2003	2002	% chg
Sony movies	618,777	577,412	7.2
Sony electronics	234,368	181,024	29.5
Sony videos	68,255	64,760	5.4
Sony recordings	26,535	14,323	85.3
989 Sports video games	19,790	16,780	17.9

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$66,363	\$61,342	8.2
Earnings	784	948	-17.3

U.S.	2003	2002	% chg
Sales	20,727	21,604	-4.1
operating income	755	811	-6.9
Division sales	2003	2002	% chg
Electronics	42,125	37,291	13.0
Pictures	6,696	6,589	1.6
Games	6,673	7,685	-13.2
Financial svcs	5,008	4,181	19.8
Music	4,315	4,210	2.5
Other	1,546	1,387	11.5

Headquarters

Sony Corp./6-7-35 Kitashinagawa, Shinagawa-ku, Tokyo, Japan 141-0001/Phone: 81-3-5448-2111.

Sony Corp./Sony Corp. of America, 550 Madison Ave., New York, N.Y. 10022/Phone: (212) 833-6800.

Notes

Sony Corp. sold Columbia House to Blackstone Group in June 2002.

Personnel, brands, agencies

Corporate: Nobuyuki Idei, grp chmn & CEO-Sony Corp.; Howard Stringer, chmn & CEO-Sony Corp. of America.

Sony Computer Entertainment America: 919 E. Hillsdale Blvd., 2nd fl., Foster City, Calif. 94404/Phone: (650) 655-8000. Kazuo Hirai, pres & chief operating officer; Andrew House, exec VP.

TBWA Worldwide, Los Angeles. Grace Kao, acct dir. — PlayStation, 989 Studios.

OMD Worldwide, Los Angeles & New York. Mike Rose, acct dir-L.A.; Meg Woods, acct dir-N.Y. — media svcs.

Sony Electronics: 1 Sony Dr., Park Ridge, N.J. 07656/Phone: (201) 930-1000. Hideki Komiyama, pres & chief operating officer; Mark Viken, gm-corp mktg.

Y&R Advertising, New York & Irvine, Calif. Angela Pih, sr VP & brand team leader. — cons electronics, computer prods.

Universal McCann Worldwide, New York. Chuck Thompson, sr VP & client svcs dir-N.Y. — media svcs.

Sony Ericsson Mobile Communications: 7001 Development Dr., P.O. Box 13969, Research Triangle Park, N.C. 27709/Phone: (919) 472-7000. Urban Gillstrom, corp VP & head-N. Amer. sls & mktg.

Bartle Bogle Hegarty, New York. Jeff Geisler, acct dir. — Sony Ericsson mobile telephones.

Sony Music Entertainment: 550 Madison Ave., New York, N.Y. 10022/Phone: (212) 833-8000. Andrew Lack, chmn & CEO; Lori Lambert, VP-strat mktg & devel, Epic Records; Marc Offenbach, sr VP-sls & mktg, Sony Classical; Jeff Jones, sr VP-jazz, Columbia Records & sr VP-Legacy Recording; Adam Owett, sr VP-creative svcs; Chris Hamer, sr VP-strategic mktg.

Universal McCann Worldwide, New York. Chuck Thompson, sr VP & client svcs dir-N.Y. — media svcs.

Sony Pictures Entertainment: 10202 W. Washington Blvd., Culver City, Calif. 90232/Phone: (310) 244-4000. Michael Lynton, chmn & CEO; Geoffrey Ammer, pres-ww mktg; Stefanie Napoli, sr VP-natl media, Columbia Pictures.

McCann Erickson Worldwide, Los Angeles. Alfa O'Neill, exec VP & gm. — Sony Pictures.

30 Sprint Corp.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$13,173	\$32,849	-59.9
Sunday magazine	NA	86	NA
Newspaper	427,505	229,943	85.9
National newspaper	49,529	41,646	18.9
Outdoor	2,942	5,635	-47.8
Network TV	233,675	229,216	1.9
Spot TV	38,712	65,193	-40.6
Syndicated TV	926	814	13.8
Cable TV networks	16,102	15,169	6.1
Network radio	NA	236	NA
National spot radio	10,476	16,258	-35.6
Internet	5,403	6,971	-22.5
Business publications	7,365	6,243	18.0
Local magazines	NA	30	NA
Measured media	805,806	650,289	23.9
Unmeasured media	263,523	212,664	23.9
Total	1,069,329	862,953	23.9
By brand	2003	2002	% chg
Sprint telecommunications	805,385	650,173	23.9

Sales & earnings (\$ in millions)

Worldwide & U.S.	2003	2002	% chg
Sales	\$26,197	\$26,679	-1.8
Earnings	1,215	630	92.9
Division sales	2003	2002	% chg
PCS Group	12,690	12,074	5.1
Global markets	7,992	8,943	-10.6
Local division	6,143	6,257	-1.8

Headquarters

Sprint Corp./6200 Sprint Pkwy., Overland Park, Kan. 66251/Phone: (913) 624-3000.

Notes

Sprint concluded on Jan. 3, 2003 the sale of its directory publishing business to R.H. Donnelley for \$2.23 billion. The unit had revenue of \$546 million in 2002 and \$556 million in 2001.

Personnel, brands, agencies

Corporate: Gary Forsee, chmn, pres & CEO; Mike Goff, VP-corp brand mgmt; Michelle Emerson, dir-brand mgmt; Anita Newton, assoc VP.

Publicis BOS Group, New York. Don Blashford, sr VP-mg dir.

Saatchi & Saatchi, New York. Debbie Jacob, acct dir. — telephone directory adv.

VML, Kansas City, Mo. West Valentine, acct dir. — interactive mktg.

Local Telephone Division: 6200 Sprint Pkwy., Overland Park, Kan. 66251/Phone: (913) 624-3000. Stephen Carter, VP-cons mktg.

Lewis Advertising, Rocky Mount, N.C. Ronnie Grillo, VP-acct svcs. — business.

NKH&W, Kansas City, Mo. Jennifer Bowlen, acct super; Sheree Johnson, sr VP & dir-media svcs. — cons.

Sprint Business Solutions: 6200 Sprint Pkwy., Overland Park, Kan. 66251/Phone: (913) 624-3000. Vicki Warker, VP-mktg opers; Anita Newton, VP-mktg comms; Tim Donahue, VP-enterprise mktg; Joni Lindquest, VP-emerging & mid-markets mktg; David Owens, VP-strategic mktg.

Publicis & Hal Riney, San Francisco. James Gassel, sr VP & grp acct dir.

Publicis Dialog, New York. Steve Wilcox, VP & acct dir; Brad Ramsey, dir-Web svcs. — direct mail, online adv.

Fahey/Davidson, Washington. Brent Earles, VP-acct svcs. — collateral.

Organic, San Francisco. George Consagra, VP & mg dir. — online media.

Sprint Consumer Solutions: 6200 Sprint Pkwy., Overland Park, Kan. 66251/Phone: (913) 624-3000. Tim Kelly, sr VP-mktg, product realization, plng & bus devel; Dave Dess, VP-brand devel & comms; Donna Osborn, sr dir-adv & brand devel.

Publicis & Hal Riney, San Francisco, Calif. James Gassel, sr VP-grp acct dir.

Advertising Checking Bureau, New York. Charles Farah, acct mgr. — co-op adv.

Brann Worldwide, Chicago. Joy Schwartz, VP-acct dir. — direct mktg.

BVK/Meka, Miami. Gonzalo Gonzalez, mg dir. — Hispanic adv.

Callahan Creek, Lawrence, Kan. John Kuefler, acct dir. — direct mktg.

Design Continuum, West Newton, Mass. Tom Burchard, brand dir. — retail design.

Foote, Cone & Belding Worldwide, Caparra, Puerto Rico. Carmen Cedre, VP & gm. — Puerto Rico adv.

Modem Media, San Francisco. Bill Firing, acct dir. — direct mktg.

Organic, San Francisco. George Consagra, VP & mg dir. — interactive mktg.

Retail Planning Associates, Columbus, Ohio. Mike Bills, pres; David Hogrefe, sr acct dir. — retail.

Two West, Kansas City, Mo. Ethan Whitehill, creative dir. — retail comms.

29 Target Corp.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$59,340	\$53,107	11.7
Sunday magazine	2,539	3,845	-34.0
Newspaper	222,096	207,209	7.2
National newspaper	6,448	6,166	4.6
Outdoor	5,502	2,311	138.1
Network TV	111,891	113,140	-1.1
Spot TV	116,651	86,658	34.6
Syndicated TV	102	1,583	-93.5
Cable TV networks	35,116	26,725	31.4
Network radio	0	59	NA
National spot radio	15,668	23,397	-33.0
Internet	13,932	6,402	117.6
Spanish-language TV	8,714	NA	NA
Business publications	1,105	588	87.9
Local magazines	1,821	1,340	35.9
Measured media	600,926	532,530	12.8
Unmeasured media	482,405	427,499	12.8
Total	1,083,332	960,028	12.8
By brand	2003	2002	% chg
Target discount stores	442,744	368,584	20.1
Mervyn's dept stores	105,158	115,203	-8.7
Marshall Field's dept stores	52,080	48,111	8.3

Sales & earnings (\$ in millions)

Worldwide & U.S.	2003	2002	% chg
Sales	\$48,163	\$43,917	9.7
Earnings	1,841	1,654	11.3
Division sales	2003	2002	% chg
Target	41,346	36,917	12.0
Mervyn's	3,553	3,816	-6.9
Marshall Field's	2,584	2,691	-4.0
Other	680	493	37.9

Headquarters

Target Corp./1000 Nicollet Mall, Minneapolis, Minn. 55403/Phone: (612) 304-6073.

Notes

Target Corp. in June 2004 agreed to sell its Marshall Field's department store chain and several Mervyn's units to May Department Stores for \$3.24 billion.

Personnel, brands, agencies

Corporate: Robert Ulrich, chmn & CEO; Michael Francis, exec VP-mktg.

Marshall Field's: 700 on the Mall, Minneapolis, Minn. 55402/Phone: (612) 375-2200. Michael Francis, exec VP-mktg.

In-house.

Haworth Marketing & Media, Minneapolis. Gary Tobey, CEO. — media svcs.

Mervyn's: 22301 Foothill Blvd., Hayward, Calif. 94541/Phone: (510) 727-3000. Michael Francis, exec VP-mktg; Lee Walker, VP-mktg.

In-house.

Haworth Marketing & Media, Minneapolis. Gary Tobey, CEO. — media svcs.

Target Stores: 1000 Nicollet Mall, Minneapolis, Minn. 55403/Phone: (612) 304-6073. Michael Francis, exec VP-mktg; Eric Erickson, creative dir.

In-house.

FAME, Minneapolis. Tina Wilcox, pres.

Peterson Milla Hooks, Minneapolis. Betsy Treinen, acct super.

Haworth Marketing & Media, Minneapolis. Gary Tobey, CEO. — media svcs.

3 Time Warner

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$273,146	\$268,762	1.6
Sunday magazine	8,407	9,330	-9.9
Newspaper	302,435	246,001	22.9
National newspaper	78,527	70,724	11.0
Outdoor	37,049	31,957	15.9
Network TV	428,753	351,692	21.9
Spot TV	148,447	178,904	-17.0
Syndicated TV	48,131	57,903	-16.9
Cable TV networks	250,123	236,983	5.5
Network radio	11,467	8,696	31.9
National spot radio	73,352	50,258	45.9
Internet	120,224	175,184	-31.4
Spanish-language TV	29,448	24,594	19.7
Business publications	37,490	32,060	16.9

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Local magazines	233	83	180.3
Measured media	1,847,231	1,743,131	6.0
Unmeasured media	1,250,109	1,179,660	6.0
Total	3,097,340	2,922,791	6.0
By brand	2003	2002	% chg
Warner Bros movies & recordgs	568,877	535,391	6.3
America Online Internet svc	255,653	208,897	22.4
New Line movies	250,522	233,011	7.5
Time Warner videos	166,576	138,632	20.2
HBO cable television	81,327	95,769	-15.1
Time Warner cable	69,398	68,001	2.1
WB television network	54,797	39,431	39.0
Sports Illustrated magazine	40,409	47,974	-15.8
TBS cable television	39,885	31,693	25.8
TNT cable television	38,327	34,160	12.2
CNN cable television	28,476	32,290	-11.8
Road Runner internet svc	13,935	13,872	0.5
Warner books & recordings	10,980	14,335	-23.4

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$39,565	\$37,314	6.0
Earnings	2,639	-98,696	NA
U.S.	2003	2002	% chg
Sales	32,123	30,761	4.4
Division sales	2003	2002	% chg
Filmed Entertainment	10,967	10,400	5.5
AOL	8,600	9,094	-5.4
Networks	8,434	7,655	10.2
Cable Systems	7,699	7,035	9.4
Publishing	5,533	5,422	2.0
Music	0	4,205	NA

Headquarters

Time Warner/1 Time Warner Center, New York, N.Y. 10019/Phone: (212) 484-8000.

Notes

Time Warner changed its name from AOL Time Warner to Time Warner in October 2003. In a move to pay down debt, Time Warner in early 2004 sold Time-Life to Direct Holdings Worldwide for \$500 million, and sold its Warner Music division for \$2.6 billion to an investor group led by Edgar Bronfman Jr., the Seagram heir, and Thomas H. Lee, the investment firm. In late 2003 it sold Heartland Music to Infinity Resources. Earlier in 2003, Time Warner sold to Viacom the 50% of Comedy Central it didn't already own for \$1.26 billion.

Personnel, brands, agencies

Corporate: Richard Parsons, chmn & CEO; Jeffery Bewkes, chmn-Ent & Networks Group; Don Logan, chmn-Media & Comms Group.

America Online: 22000 AOL Way, Dulles, Va. 20166/Phone: (703) 265-1000. Jonathan Miller, chmn & CEO; Ted Leonsis, vice chmn & pres-AOL core svcs; Joseph Ripp, vice chmn; Lisa Hook, pres-AOL for Broadband, Premium & Platform svcs; J. Michael Kelly, chmn & CEO-AOL intl & web svcs; Joe Redling, chief mktg officer; Lisa Brown, pres-interactive mktg; Michael Kelly, pres-AOL Media Networks; Mercy Lugo-Struthers, AOL Latino dir-Hispanic mktg.

BBDO Worldwide, New York. Nancy Hill, exec VP & mg dir. — broadband, entertainment svcs.

Wieden & Kennedy, Portland, Ore. Trish Adams, acct dir. — corp awareness adv, corp brand adv.

Initiative Media North America, New York. Larry Orell, exec VP & gm. — media svcs, AOL, CompuServe, Digital City, ICQ, Mapquest, Moviefone, Netscape.

Atmosphere BBDO, New York. Andreas Combuechen, CEO & chief creative officer. — online adv.

Digitas, New York. Dani Nadel, sr VP-mktg — contact strategy, online media svcs.

Casanova Pendlill Publicidad, Costa Mesa, Calif. Hassam Bustillos, acct exec; Allen Payano, acct dir. — Hispanic adv, AOL, AOL Latino.

Market Vision, San Antonio. Bonnie Garcia, founder. — promotions, AOL Latino.

Home Box Office: 1100 Ave. of the Americas, New York, N.Y. 10036/Phone: (212) 512-1000. Chris Albrecht, chmn & CEO; Bill Nelson, chief operating officer; Eric Kessler, pres-sls & mktg; Courtney Monroe, sr VP-adv.

BBDO Worldwide, New York. Andy Russem, exec VP & sr acct dir.

New Line Cinema: 116 N. Robertson Blvd., Suite 200, Los Angeles, Calif. 90048/Phone: (310) 854-5811. Robert K. Shaye, co-chmn & co-CEO; Michael Lynne, co-chmn & co-CEO; Rolf Mittweg, pres & CEO-ww distribution & mktg; Russell Schwartz, pres-domestic mktg; David Tuckerman, pres-domestic theatrical dist; Diane Charbanic, exec VP-media & co-op adv; Lisa Balshan, sr VP-nat'l promos.

Carat North America, New York & Los Angeles, N.Y. Annie Chen, natl bdcst dir; Susan Victor, acct dir; Jenny Wakumoto, acct super. — media svcs, New Line Cinema, New Line Home Video, Fine Line Features.

Southern Progress Corp. (a div of Time Inc.): 2100 Lakeshore Dr., Birmingham, Ala. 35209/Phone: (205) 445-6000. Tom Angelillo, pres & CEO; Scott Sheppard, exec VP-grp pub; *Coastal Living*: Allison Thomas, mktg dir; *Cooking Light*: Kate Darden, mktg dir; *Cottage Living*: Susan Sutton, mktg dir; *Health*: Eileen Kiernan, assoc dir-mktg; *Progressive Farmer*: Allen Vaughn, mktg svcs dir; *Southern Accents*: David Vaughan, mktg dir; *Southern Living*: Theresa Lux, dir-mktg; *Sunset*: Beth Whiteley, VP & mktg dir.

In-house. — *Coastal Living*, *Cooking Light*, *Cottage Living*, *Health*, *Progressive Farmer*, *Southern Accents*, *Southern Living*, *Sunset*.

Time Inc.: Time & Life Building, Rockefeller Center, New York, N.Y. 10020/Phone: (212) 522-1212. Ann Moore, chmn & CEO; Norman Pearlstine, editor-in chief; *Entertainment Weekly*: Andy Sareyan, pres; Paul Caine, pub; Tom Morrissey, assoc pub-sls; Peggy Mansfield, assoc pub-mktg; Sandy Drayton, VP-comms & TV devel; Holly Cavanna, cons mktg dir; Nancy Ryan, gm; Fred O. Nelson, VP-editorial devel; Carol Mazzarella, dir-prodn & tech; *In Style*: Stephanie George, pres; Lynette Harrison, pub; Amy Keohane, cons mktg & devel; Fortune & Money Group: Christopher J. Poleway, pres; Michael V. Dukmejian, pub; *Fortune*: Michael Federle, pub; *Money*: Jim Richardson, assoc pub-mktg; Laurie Howlett, VP-mktg; *Fortune Small Business*: Hugh Wiley, pub; *People Group*: Nora P. McAniff, exec VP-Time Inc.; *Parenting Group*: David Kieselstein, pres; Nancy Hallberg, grp VP mktg; *Parenting*: Jeff Wellington, pub; *Baby Talk*: Greg

Schumann, pub; *People Group*: John L. Brown, VP-cons mktg, *People Group*; *People*: Kathleen H. Kayse, pub; Jennifer Ogden-Reese, dir-cons mktg; Amy Dice, assoc pub-adv; Peter Jurew, assoc pub-mktg; David Geithner, gm; Nancy Valentino, dir-comms & event mktg; *People en Espanol*: Lisa Quiroz, pub; Jose Raul Perez, dir-cons mktg; Ruth Gavaria, dir-mktg; *Real Simple*: Robin Domeniconi, pres & pub; Steve Sachs, VP cons mktg-*Real Simple*, *InStyle* & *Parenting*; Kevin White, assoc pub-sales; Grant Schneider, assoc pub-mktg; *Sports Illustrated*: John Squires, pres; David Morris, pub; Johnathan Shar, cons mktg dir; Jeff Price, VP chief mktg officer; *Sports Illustrated for Kids*: Dave Watt, pub; Gabrielle Severini, brand mgr; *Teen People*: Jack Rotherham, pub; Time: Ellen Naughton, pres; Ed McCarrick, ww pub; Taylor Gray, ww assoc pub & mktg dir; Matthew Turck, assoc pub; Charlie Kammerer, eastern adv dir; Steve Cambron, mktg dir.

In-house. — *Entertainment Weekly*, *People*, *People en Espanol*, *Teen People*, *Sports Illustrated for Kids*.

No agency. — *Parenting Group*: *Baby Talk*, *First Moments*, *Healthy Pregnancy*, *Parenting*.

Black Canyon Productions, New York. Steve Stern, ptnr. — direct mktg, direct response-TV adv, *Sports Illustrated*.

Deutsch, New York. — *Money Magazine*.

Fallon Worldwide, New York. — cons awareness adv, cons branding, *Sports Illustrated*, *Time*.

KraftWorks, New York. Trente Miller, bus mgr. — cons awareness adv, cons mktg, *InStyle*.

Larry Sons, New York. Larry Sons, pres. — direct mktg, direct response-TV adv, *Sports Illustrated*.

Mullen, Wenham, Mass. Bruce Gold, acct super. — *Fortune*, *FSB*.

Rowan Warren, New York. Larry Rowan, pres. — direct mktg, direct response-TV, *Sports Illustrated*.

Time Warner Book Group: 1271 Ave. of the Americas, New York, N.Y. 10020/Phone: (212) 522-7200. Laurence J. Kirshbaum, chmn & CEO; Maureen Mahon Egen, pres & chief operating officer; Christine Barba, VP dir-sales & mktg.

In-house. Cheryl Rozier, adv dir. — Aspect, Back Bay, Bulfinch Press, Little, Brown & Co, Mysterious Press, Time Warner AudioBooks, Walk Worthly Press, Warner Books, Warner Faith, Warner Vision.

Time Warner Cable: 290 Harbor Dr., Stamford, Conn. 06902/Phone: (203) 328-0600. Glenn A. Britt, chmn & CEO; John Billock, chief operating officer; Tom Baxter, pres; Larry Fischer, pres-Time Warner Cable Ad Sales; Charles Ellis, exec VP & chief mktg officer; Lynn Yaeger, exec VP corporate affairs; Brian Kelly, sr VP-mktg; Alan Blum, sr VP-ad sls; Brendan Gleeson, sr VP-ad sls.

SSK, New York. Lenny Stern, founding ptnr; Bill Bergofin, VP-mktg.

Time4 Media: 2 Park Avenue, New York, N.Y. 10016/Phone: (212) 779-5000. Mark Ford, pres; *Golf Magazine*: Chris Wightman, pub; Robert Schupler, dir-mktg; Marine Grp: Gary De Sanctis, VP-sales, *Yachting*, *MotorBoating*, *Salt Water Sportsman*; William Hogue, dir-mktg; Mountain Sports Media: Jamie Pentz, grp pub-Ski & Skiing; Stef Luciano, dir-mktg; *Popular Science*: Gregg Hano, pub; Dennett Robertson, dir-mktg; *This Old House Magazine*: Rich Berenson, pub; Jennifer Jacobsen, dir-mktg; Time4Outdoors: Tom Ott, grp pub-*Field & Stream*, *Outdoor Life*; Kerry Bianchi, mktg; Transworld Media: Al Crolus, VP-sls & mktg; Ashley Otte, ad sls mgr, *Freeze*; Todd Toth, assoc pub-*Ride*

BMX & Transworld BMX, Transworld Motocross: Marc Fiore, assoc pub; **Transworld Skateboarding:** Monica Campana, assoc pub; **Transworld Snowboarding:** Justin Cobb, ad sls mgr; **Transworld Surf:** Liam Ferguson, assoc pub.

In-house. — **BMX Business News, Field & Stream, Freeze, Golf Magazine, MotorBoating, Outdoor Life, Popular Science, Ride BMX, Salt Water Sportsman, Ski, Skiing, Skiing Trade News, This Old House Magazine, TransWorld BMX, TransWorld Business, TransWorld Motocross, TransWorld Skateboarding, TransWorld Surf.**

Turner Broadcasting System: One CNN Center, Atlanta, Ga. 30303/Phone: (404) 827-1700. Phil Kent, chmn & CE-TBS, Inc.; Terence F. McGuirk, vice chmn-TBS, Inc. & chmn/pres-Atlanta Braves; Jim Walton, pres-CNN News Group; Greg D'Alba, chief operating officer-CNN adv sls & mktg; Mark Lazarus, pres-Turner Entertainment Group.

Agencies assigned on a project basis. — CNN, TBS, TNT, TCM, Turner South.

Agency in review. — Atlanta Braves.

In-house. Anne Marie Loeffler, VP media svcs. — media svcs, Cartoon Network.

Warner Bros. Entertainment Inc: 4000 Warner Blvd., Burbank, Calif. 91522/Phone: (818) 954-6000. Barry Meyer, chmn & CEO; Alan Horn, pres & chief operating officer; Dawn Taubin, pres-domestic mktg, Warner Bros Pics; Lynn Whitney, sr VP-ww media, Warner Bros Pics; Dan Romanelli, pres-Warner Bros Consumer Prods; Sander Schwartz, pres-Warner Bros Animation; Paul Levitz, pres & pub-DC Comics.

Grey Entertainment, Burbank, Calif. Kris Coontz, exec VP-media. — media svcs, Warner Bros studio.

In-house. — DC Comics, Looney Tunes, Warner Pictures licensing ops.

WB Network (joint venture of Tribune Co. & WB Communications): 4000 Warner Blvd, Burbank, Calif. 91522/Phone: (818) 977-5000. Garth Ancier, chmn; Jordan Levin, CEO; Bill Morningstar, exec VP-media sls.

In-house.

MediaCom, Los Angeles. Kris Coontz, exec VP-Entertainment mktg. — media svcs.

10 Toyota Motor Corp.

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$253,892	\$222,980	13.9
Sunday magazine	3,854	2,594	48.6
Newspaper	37,360	35,199	6.1
National newspaper	38,911	36,419	6.8
Outdoor	13,566	10,509	29.1
Network TV	277,561	250,196	10.9
Spot TV	201,345	217,205	-7.3
Syndicated TV	5,613	2,314	142.6
Cable TV networks	77,847	86,560	-10.1
Network radio	3,523	4,118	-14.5
National spot radio	4,648	244	NA
Internet	47,896	22,826	109.8
Spanish-language TV	45,516	42,127	8.0
Business publications	2,367	2,301	2.8
Local magazines	289	244	18.5
Measured media	1,014,188	935,837	8.4
Unmeasured media	668,539	616,891	8.4
Total	1,682,726	1,552,728	8.4

By brand	2003	2002	% chg
Toyota vehicles	757,356	704,771	7.5
Lexus vehicles	256,611	231,035	11.1

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$153,105	\$127,234	20.3
Earnings	10,288	6,134	67.7
North America	2003	2002	% chg
Sales	52,323	48,671	7.5
Operating income	3,461	2,298	50.6
Division sales	2003	2002	% chg
Automotive	141,316	117,378	20.4
Financial svcs	6,345	5,807	9.3
Other	5,444	4,048	34.5

Headquarters

Toyota Motor Corp./1 Toyota-cho, Toyota City, Aichi Prefecture, Japan 471-71/Phone: 81-565-28-2121.

Toyota Motor Corp./Toyota Motor Sales USA, 19001 S. Western Ave., Torrance, Calif. 90501/Phone: (310) 468-4000.

Personnel, brands, agencies

Corporate: Hiroshi Okuda, chmn-Toyota Motor Corp.; Fujio Cho, pres-Toyota Motor Corp.; Yukitoshi Funo, pres & CEO-Toyota Motor Sales USA; James E. Press, exec VP & chief operating officer-Toyota Motor Sales USA.

Oasis Advertising, New York. Paul Bernasconi, ptrn & creative dir.

Conill, Torrance, Calif. Carlos Martinez, gm; Cynthia McFarlane, mg dir. — Hispanic adv.

Lexus Division: 19001 S. Western Ave., Torrance, Calif. 90501/Phone: (310) 468-4000. Denny Clements, grp VP & gm; Mark Templin, VP-mktg; George Christoff, VP-svc, parts, customer satisfaction & training; Michael Wells, VP-sls & dealer devel; Robin Pisz, natl interactive mktg mgr; Lynda Eguchi, media & publications mgr; Barry Jay, creative mgr.

Team One Advertising, El Segundo, Calif. Brian Sheehan, chmn & CEO; John Powers, exec dir; Chris Graves, exec creative dir. — Lexus vehicles.

Burrell Communications Group, Chicago. Fay Ferguson, mg dir. — African-American adv.

Conill, Torrance, Calif. Carlos Martinez, gm; Cynthia McFarlane, mg dir. — Hispanic adv.

Scion Division: 19001 S. Western Ave., Torrance, Calif. 90501/Phone: (310) 468-4000. James D. Farley, VP; Brian Bolain, natl sls promo mgr; Dawn L. Morgan, natl mktg comms mgr.

Attik, San Francisco. Will Travis, pres; Kevin George, acct mgr. — Scion vehicles.

Oasis Advertising, New York. Ruby Fiorito, acct mgr. — interactive mktg.

Toyota Division: 19001 S. Western Ave., Torrance, Calif. 90501/Phone: (310) 468-4000. Donald V. Esmond, sr VP & gm; James Lentz, grp VP-mktg; Bob Carter, VP-sls; Deborah Wahl Meyer, corp mgr-mktg comms; Steve Jett, natl car adv & event mgr; Celeste Migliore, natl truck adv mgr; Mark Simmons, natl mgr-adv strategy & media.

Saatchi & Saatchi, Torrance, Calif. Rich Anderman, pres & chief operating officer; Tim Murphy, grp acct dir. — Toyota vehicles.

Burrell Communications Group, Chicago. Fay Ferguson, mg dir; Ella Britton, VP & acct dir. — African-American adv.

Conill, Torrance, Calif. Carlos Martinez, gm; Cynthia McFarlane, mg dir. — Hispanic adv.

17 Unilever

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$115,620	\$178,764	-35.3
Sunday magazine	2,682	2,282	17.6
Newspaper	1,184	992	19.3
National newspaper	181	156	15.4
Outdoor	791	1,583	-50.0
Network TV	259,026	304,961	-15.1
Spot TV	30,237	39,523	-23.5
Syndicated TV	47,518	58,928	-19.4
Cable TV networks	82,364	92,273	-10.7
Network radio	434	1,224	-64.6
National spot radio	6,649	2,499	166.1
Internet	5,242	7,581	-30.9
Spanish-language TV	16,684	9,583	74.1
Business publications	3,206	3,608	-11.1
Local magazines	16	8	108.0
Measured media	571,831	703,965	-18.8
Unmeasured media	760,316	936,003	-18.8
Total	1,332,148	1,639,968	-18.8
By brand	2003	2002	% chg
Dove skin care products	146,889	87,853	67.2
Slim Fast dietary supplements	43,414	80,755	-46.2
Slim Fast dietary supplement	38,540	42,978	-10.3
Axe deodorant & body spray	26,971	13,449	100.5
Lipton tea & packaged foods	25,546	41,183	-38.0
Vaseline skin care products	23,719	18,696	26.9
Suave hair & skin products	21,481	23,699	-9.4
Ragu pasta sauce	20,832	32,535	-36.0
Snuggle fabric softener	20,717	22,148	-6.5
Degree anti-persp & deod	19,906	26,715	-25.5
Wish-Bone salad dressings	16,867	18,257	-7.6
Eternity fragrance	15,485	17,189	-9.9
Hellmann's mayonnaise	15,085	17,406	-13.3
Caress body lotion	13,319	25,242	-47.2
Lever 2000 soap	13,042	18,692	-30.2
Thermasilk hair care prods	12,840	32,790	-60.8
All laundry detergent	10,670	19,219	-44.5

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$48,727	\$45,868	6.2
Earnings	3,152	2,030	55.3
North America	2003	2002	% chg
Sales	11,155	11,827	-5.7
Operating profit	1,257	1,495	-15.9
Division sales	2003	2002	% chg
Personal care	12,718	11,627	9.4
Savory & dressings	9,759	8,811	10.8
Home care	8,246	8,139	1.3
Ice cream & frozen foods	7,982	7,085	12.7
Spreads & cooking products	5,680	5,839	-2.7
Health, wellness & beverages	3,936	3,862	1.9
Other	406	505	-19.6

Headquarters

Unilever/3000 DK, P.O. Box 760, Rotterdam, Netherlands /Phone: 31-10-217-4000.

Unilever/390 Park Ave., New York, N.Y. 10022-4698/Phone: (212)888-1260.

Personnel, brands, agencies

Corporate: Niall FitzGerald, chmn; Antony Burgmans, chmn; Brad Simmons, VP-media, U.S.

Ben & Jerry's Homemade: 30 Community Dr., South Burlington, Vt. 05403-6828/Phone: (802) 846-1500. Yves Couette, CEO; Walt Freese, dir-mktg.

In-house.

Good Humor-Breyers: 909 Packerland Dr., Green Bay, Wis. 54303/Phone: (920) 499-5151. Eric Walsh, pres; Terry Olson, VP-mktg.

Campbell Mithun, Minneapolis. Tim Hawley, sr VP & gm. — Breyers All Natural, Klondike, Popsicle.

Home & Personal Care: 33 Benedict Place, Greenwich, Conn. 06836/Phone: (203) 661-2000. Harish Manwani, pres-Home & Personal Care, N. Amer.; Randy Quinn, sr VP-brand devel; Alan Joep, chief operating officer; Jon Achenbaum, gm-hair; Stan Cook, gm-deodorant; Bill Littlefield, gm-specialty; Bob Shipley, gm-laundry.

Bartle Bogle Hegarty, New York. Bob Ferrini, acct mgr; Tina Wang, acct mgr. — Axe, All laundry detergent.

DDB Worldwide Communications, Chicago. Susan Lulich, acct super. — Degree.

J. Walter Thompson Co., New York. Stephanie Hancock, sr ptnr & mg dir. — Lever 2000 bar soap, Lever 2000 body wash, Lever 2000 moisturising wipes, Thermasilk shampoos, conditioners & styling aids, Caress.

Lowe & Partners Worldwide, New York. Michael Baer, exec VP & mg dir. — Snuggle, Wisk.

McCann Erickson Worldwide, New York. Mary-Ann Dalgleish, grp dir. — Vaseline Intensive Care.

No agency. — Q-Tips, Mentadent.

Ogilvy & Mather Worldwide, New York & Chicago. Vivian Rowden, mg ptnr & grp acct dir. — Dove, Ponds, Rave, Suave.

MindShare Worldwide, New York. Mike Styles, AOR dir. — media svcs.

Slim-Fast Foods Co.: 777 S. Flagler Dr., West Tower, Ste. 1400, West Palm Beach, Fla. 33401/Phone: (561) 833-9920. John Rice, pres & CEO; Mark Covent, pres; Terry Olson, gm; Joanne Moscatto-Hogan, interactive dir.

Grey Worldwide, New York. Ken Levy, exec VP & mg ptnr.

Unilever Bestfoods: 800 Sylvan Ave., Englewood Cliffs, N.J. 07632/Phone: (201) 567-8000. John W. Rice, pres & CEO; David Landers, N. amer. pres & chief operating officer-UBF Foodsolutions; Foodsolutions: Michael Polk, sr VP mktg & chief operating officer; Mike Bauer, sr VP & gm-spreads and dressings; Bauke Rouwers, VP & gm-Lipton, Skippy, Promise, Carb Options; Amanda Sourry, VP & gm-Ragu, Bertolli, Lawry's, Lipton Sides, Knorr; Lisa Klauser, VP-integrated mktg capability; Donna Goldfarb, sr dir-cons & mktg insight; Phyllis Joseph, sr mgr-comms channel plng.

Dailey & Associates, Los Angeles. John Stranger, sr VP & grp mgmt super. — Lawry's.

DDB Worldwide Communications, New York. Suheil Pimentel, acct mgr. — Lipton soups & prepared meals.

J. Walter Thompson Co., New York. Stephanie Hancock, sr ptrn and mg dir. — Cheese Creations, Chunky Garden Style, Lipton Cold Brew, Lipton Iced Tea Mixes, Lipton Red & Yellow Tea Bags, Lipton Specialty Teas, Matika, Old World Style, Ragu Express, Robusto!, Lipton Cup-A-Soup, Ragu Rich 'n Meaty.

McCann Erickson Worldwide, New York. Linda Luca, exec VP. — I Can't Believe It's Not Butter, Skippy peanut butter, Take Control.

Stone & Simons Advertising, Detroit. Douglas Stone, exec VP. — Brummel & Brown, Country Crock, Imperial.

MindShare Worldwide, New York. Mike Styles, AOR dir. — media svcs.

Unilever Cosmetics International: 725 Fifth Ave., New York, N.Y. 10022/Phone: (212) 759-8888. Fergus Balfour, pres & CEO; Hilary Dart, pres, Calvin Klein Cosmetics; Marisa Thalberg, VP-global adv & prodn.

CRK Advertising (In-house). — Calvin Klein cosmetics & fragrances.

94 United Parcel Service

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$6,594	\$21,365	-69.1
Sunday magazine	2,523	NA	NA
Newspaper	795	1,222	-34.9
National newspaper	4,613	3,625	27.3
Outdoor	117	331	-64.8
Network TV	109,689	95,935	14.3
Spot TV	1,452	7,236	-79.9
Syndicated TV	248	274	-9.5
Cable TV networks	19,528	14,597	33.8
Network radio	367	375	-2.1
National spot radio	17,016	13,702	24.2
Internet	518	1,371	-62.2
Yellow Pages	5,797	4,914	18.0
Business publications	2,931	2,974	-1.5
Local magazines	1	NA	NA
Measured media	172,187	167,920	2.5
Unmeasured media	167,638	163,484	2.5
Total	339,825	331,404	2.5
By brand	2003	2002	% chg
UPS shipping services	159,083	143,900	10.6

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$33,485	\$31,272	7.1
Earnings	2,898	3,182	-8.9
U.S.	2003	2002	% chg
Sales	27,924	26,692	4.6
Division sales	2003	2002	% chg
U.S. domestic package	25,022	23,924	4.6
International package	5,561	4,680	18.8
Non-package	2,902	2,668	8.8

Headquarters

United Parcel Service/55 Glenlake Pkwy. N.E., Atlanta, Ga. 30328/Phone: (404) 828-6000.

Personnel, brands, agencies

Corporate: Michael L. Eskew, chmn & CEO; Kurt Kuehn, sr VP-ww sls & mktg; Gary Mastro, VP-sls & mktg; Ed Buckley, VP-brand mgmt; Larry Bloomenkranz, VP-brand mgmt & adv; Rick Radermacher, dir-U.S. adv & media.

Martin Agency, Richmond, Va. Ian Davidson, exec VP; Chris Mumford, VP & mgmt super; Matt Williams, sr VP-sr strategic planner; Mark Pavia, sr VP-exec media dir; Chris Jacobs, sr VP-creative dir; Andy Azula, sr VP-creative dir.

Lowe & Partners Worldwide, New York. Elissa Goldman, exec VP & dir-media svcs. — media buying-natl bdcast.

UPS Store/Mail Boxes Etc.: 6060 Cornerstone Ct. W., San Diego, Calif. 92121-3795/Phone: 858-455-8800. Stuart Mathis, pres; Kurt M. Schusterman, VP-mktg.

Doner, Newport Beach, Calif. Greg Gerfen, sr VP-acct dir; Susan LaRue, strategic planner; Lori Collins, VP-assoc media dir; Gary Wolfson, exec VP-exec creative dir.

28 U.S. Government

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$115,485	\$93,646	23.3
Sunday magazine	14,141	18,614	-24.0
Newspaper	32,433	38,065	-14.8
National newspaper	17,192	22,414	-23.3
Outdoor	6,225	6,548	-4.9
Network TV	203,364	192,088	5.9
Spot TV	40,631	36,335	11.8
Syndicated TV	21,534	22,915	-6.0
Cable TV networks	113,284	125,154	-9.5
Network radio	12,512	19,917	-37.2
National spot radio	9,542	10,937	-12.8
Internet	9,547	7,345	30.0
Spanish-language TV	41,826	30,850	35.6
Business publications	5,069	6,563	-22.8
Local magazines	45	52	-14.5
Measured media	642,827	631,443	1.8
Unmeasured media	459,491	451,353	1.8
Total	1,102,318	1,082,796	1.8
By brand	2003	2002	% chg
Office of Natl Drug Control	181,067	190,003	-4.7
U.S. Army	116,239	118,979	-2.3
U.S. Air Force	58,374	54,685	6.7
USPS	42,485	73,486	-42.2
Dept of Health & Human Svcs	35,933	19,887	80.7
Center for Disease Control	32,374	22,726	42.5
U.S. Navy	29,254	26,935	8.6
Amtrak railroad	24,759	19,157	29.2
U.S. Dept of the Treasury	16,449	770	2035.9
U.S. Marines	15,185	18,874	-19.5
U.S. Mint	10,079	2,688	274.9

Notes

The Ad Council assigned work for the Department of Homeland Security on a project basis, including television spots from Interpublic Group of Cos.' the Martin Agency, Richmond Va., and a Web site by Ruder Finn Interactive. Both the U.S. Coast Guard and the Federal Emergency Management agency are now part of the Department of Homeland Security.

Personnel, brands, agencies

Air National Guard: ANG/DPFR, Ste. 10415, 1411 Jefferson Davis Hwy., Arlington, Va. 22202/Phone: (703) 607-3248. Maj. Mary Burr, chief-recruiting & retention, adv resources & training branch.

Laughlin Marinaccio & Owens Advertising, Arlington, Va. Chris Laughlin, acct exec.

Amtrak: 10 G St., N.E./Ste. 3E-562, Washington, D.C. 20002/Phone: (202) 906-4806. David Gunn, CEO; David Lim, VP-mktg & brand mgmt; Gail Reisaman, sr dir-adv & brand mgmt.

Arnold Worldwide. Paul Burlingham, acct dir.

Army National Guard: NGB-ASM/1411 Jefferson Davis Hwy., Arlington, Va. 22202/Phone: (703) 607-3563. Lt. Gen. Daniel James III, dir; Lt. Col. Michael Jones, chief-adv & mktg.

Laughlin Marinaccio & Owens Advertising, Arlington, Va. Doug Laughlin, pres.

Docupak, Birmingham, Ala. Philip Crane, acct super. — sales promo & direct mktg.

Bureau of Engraving & Printing: 14th St. and C St. SW, Washington, D.C. 20228/Phone: (202) 874-3545. Thomas A. Ferguson, dir; Dawn Haley, chief-external relations.

Burson-Marsteller, Washington. James C. Lake, client mg ptnr. — currency introduction campaign.

Centers for Disease Control & Prevention: 4770 Buford Highway, NE, Atlanta, Ga. 30341/Phone: (770) 488-6480. Dr. Julie Louise Gerberding, dir; Faye Wong, dir-VERB campaign; Lori Asbury, creative team lead-VERB campaign.

Saatchi & Saatchi, New York. Bob McKinnon, exec VP & dir-strategic comms.

A Partnership, New York. Anita Lai, acct dir. — Asian-American adv.

Frankel, Chicago. Eric Rosenthal, sr VP & mg dir. — sls promo, events.

G&G Advertising, Albuquerque, N.M. Michael Gray, pres & creative dir. — American Indian adv.

Garcia 360, San Antonio. Galeana Woodson, acct dir. — Hispanic adv.

PFI:Marketing, New York. David Prince, pres & mg ptnr. — African-American adv.

Publicis Dialog, Chicago. Lauren Russ, sr principal-cons grp. — PR.

Central Intelligence Agency: CIA Recruitment Center, Washington, D.C. 20505/Phone: (703) 482-0623. George Tenet, dir.

In-house. — recruitment adv.

Department of Homeland Security: Nebraska Avenue Center (NAC), 3801 Nebraska Avenue, N.W., Washington, D.C. 20528/Phone: (202) 282-8000. Tom Ridge, secretary; Susan Neely, asst sec-pub affairs.

Agencies assigned on a project basis.

Department of the Army: Office of the Assistant Secretary of the Army, Marketing Strategy Group, Washington, D.C. 20310/Phone: (703) 697-3447. Hon. Les Brownlee, acting secretary; Gen. Peter J. Shoomaker, chief of staff-Army; Reginald J. Brown, asst secretary-manpower & reserve affairs; John P. McLaurin III, deputy asst secretary-human resources; Barry N. Lipsy, chief mktg officer.

Leo Burnett Worldwide, Chicago. Tim Bergin, exec VP & acct dir; Ray DeThorne, exec VP & acct dir.

Starcom, Chicago. Andrew Swinand, sr VP- grp client dir. — media svcs.

Housing & Urban Development: 451 Seventh St. S.W., Room 9166, Washington, D.C. 20410/Phone: (202) 708-0317. Alphonso Jackson, secretary; A. Jo Baylor, chief-office of small & disadvantaged businesses.

Agencies assigned on a project basis.

Internal Revenue Service: 1111 Constitution Ave. N.W., Washington, 20503/Phone: (202) 622-4349. Frances Keith, chief comms & liaison; Gail Ellis, chief-mktg.

Foote, Cone & Belding Worldwide, New York. Jeff Tarakajian, dir-global clients & new bus.

Joint Advertising, Market Research & Studies: 4040 Fairfax Dr., Ste 200, Arlington, Va. 22203/Phone: (703) 696-0850. Sharon Cooper, prog mgr; Matt Boehmer, deputy prog mgr; Maj. Rene Stockwell, chief-joint adv; Lt. Warren Heiser, project officer-joint adv; Capt. Maurice Brown, project officer-joint adv; Andrea Zucker, project officer-market research & studies.

Mullen, Wenham, Mass. John Piscitelli, acct super.

Office of National Drug Control Policy: 750 17th St. NW, Washington, D.C. 20503/Phone: (202) 395-6627. John P. Walters, dir; Robert Denniston, dir-nat'l youth anti-drug media campaign; Kendall B. Oliphant, adv svcs mgr.

Ogilvy & Mather Worldwide, New York. David McConnaughey, account dir. — Office of National Drug Control.

MindShare Worldwide, New York. — media svcs, Office of National Drug Control.

Admerasia, New York. Zan Ng, founder & pres. — Asian-American adv, Office of National Drug Control.

Bromley Communications, San Antonio. Kim Chance, grp dir. — Hispanic adv, Office of National Drug Control.

G&G Advertising, Albuquerque, N.M. Michael Gray, pres. — American Indian population, Office of National Drug Control.

Lopito Ileana & Howie, San Juan, P.R. — Puerto Rican adv.

Porcaro Communications, Anchorage, Ala. Mark Hopkins, pres. — Alaskan natives, Office of National Drug Control.

Publicis Dialog, Chicago. Lauren Russ, principal-cons grp. — PR.

UniWorld Group, New York. — African-American adv, Office of National Drug Control.

U.S. Air Force: Air Force Recruiting Service RSM, 550 D St. W., Ste 1, Randolph AFB, Texas 78150-4527/Phone: (210) 565-0503. Dr. James G. Roche, secretary; Brig. Gen. Dutch Remkes, cmdr, Air Force recruiting svcs; Col. Bob East, vice cmdr; Col. Brian Madtes, chief, mktg div; Tim Talbert, deputy chief, mktg div.

GSD&M, Austin, Texas. Lee Pilz, acct dir.

Dieste, Harmel & Partners, Dallas. Tony Dieste, CEO. — Hispanic adv.

Merkle Direct Marketing, Lanham, Md. Michael Matthias, sr VP client mgmt svcs. — Database mgmt.

Tribal DDB, Dallas. Jeff Erickson, acct exec. — interactive mktg.

U.S. Air Force Reserve: HQAFRC/RSA, 1000 Corporate Pointe, Warner Robins, Ga. 31088/Phone: (478) 327-0655. Col. Francis M. Mungavin, dir-recruiting; Lt. Col. Jerry Herbel, chief-adv & info systems; Chief Master Sgt. R. Eric Snipes, chief-adv branch.

TMP Worldwide, Atlanta. Ron Blum, natl dir; Byron Galway, genl acct mgr.

U.S. Army Accessions Command: Strategic Outreach Office, Fort Knox, Ky. 40121-2726/Phone: (502) 626-0141. Lt. Gen. Dennis Cavin, commanding genl; Col. Thomas Nickerson, dir-strategic outreach.

Leo Burnett Worldwide, Chicago. Tim Bergin, exec VP & acct dir; Ray DeThorne, exec VP & acct dir.

Cartel Group, San Antonio. Victoria Varela Hudson, pres; Fiona Roache, acct dir. — Hispanic adv.

Muse Codero Chen & Partners, New York. Larry Glover, acct exec. — multicultural adv.

U.S. Army Cadet Command: Director of Recruiting, Retention, Marketing & Operations, U.S. Army Cadet Command, Building 56, Fort Monroe, Va. 23651-5000/Phone: (757) 788-4850. Col. Michael J. Hoff, dir-recruiting, retention, mktg & opers.

Leo Burnett Worldwide, New York. Tim Bergin, exec VP & acct dir; Ray DeThorne, exec VP & acct dir.

U.S. Army Reserve: Office of the Chief, Army Reserve, Washington, D.C. 20310/Phone: (703) 601-4759. Lt. Gen. James R. Helmly, chief; Lt. Col. Lora Tucker, chief recruiting & prospect comms.

Leo Burnett Worldwide, Chicago. Tim Bergin, exec VP-acct dir; Ray DeThorne, exec VP-acct dir.

U.S. Coast Guard (Department of Homeland Security): U.S. Coast Guard Recruiting Command, 4200 Wilson Blvd., Ste. 450, Arlington, Va. 22203-1804/Phone: (202) 493-6646. Adm. Thomas H. Collins, commandant; Mauro Cooper, chief-recruit adv.

Cossette Post, New York. Fred Morris, VP client relationship mgr; Margot Grady, VP media dir.

U.S. Marine Corps: Marine Corps Recruiting Command, 3280 Russell Rd., Quantico, Va. 22134/Phone: (703) 784-9434. Maj. Genl. Christopher Cortez, commanding genl; Maj. Michael Zeliff, asst chief of staff-adv.

J. Walter Thompson Co., Atlanta. Jeff White, pres & gm.

Merkle Direct Marketing, Lanham, Md. Michael Matthias, sr VP-client mgmt svcs. — database mgmt.

U.S. Mint: 801 9th St. NW, Washington, D.C. 20220/Phone: (202) 874-6000. Henrietta Holsman Fore, dir; Gloria Eskridge, assoc dir-mktg.

Greenberg, Seder, James & Sterling, Washington, D.C. — United States Mint, state quarters, Westward Journey nickel series, American Eagle silver, gold & platinum proof coins.

U.S. Navy: Navy Recruiting Command, 5722 Integrity Drive Bldg. 784, Millington, Tenn. 38054/Phone: (901) 874-9388. Rear Adm. Jeffrey L. Fowler, Cmdr-Navy Recruiting Command; Capt. David Faasse, dir-adv & mktg.

Campbell-Ewald, Warren, Mich. Kathleen M. Donald, exec VP & acct dir.

Accent Marketing, Miami. Lisette Hoyo, acct dir. — Hispanic mktg.

GlobalHue, Southfield, Mich. Allen Pugh, grp acct dir. — African-American adv.

U.S. Postal Service: 475 L'Enfant Plaza SW, Room 1141, Washington, D.C. 20260-1019/Phone: (202) 268-3050. John E. Potter, postmaster general & CEO; Rod DeVar, mgr adv.

Campbell-Ewald, Detroit. Jim Palmer, pres & mg dir.

11 Verizon Communications

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$34,954	\$25,828	35.3
Sunday magazine	NA	311	NA
Newspaper	460,842	340,357	35.4
National newspaper	52,838	36,586	44.4
Outdoor	28,199	18,918	49.1
Network TV	249,527	257,225	-3.0
Spot TV	153,364	212,397	-27.8
Syndicated TV	6,969	18,043	-61.4
Cable TV networks	73,946	59,557	24.2
Network radio	132	4,037	-96.7
National spot radio	79,219	71,268	11.2
Internet	21,178	12,195	73.7
Yellow Pages	10,823	9,393	15.2
Spanish-language TV	22,115	25,367	-12.8
Business publications	3,551	1,285	176.4
Local magazines	92	14	568.8
Measured media	1,197,750	1,092,781	9.6
Unmeasured media	476,453	434,698	9.6
Total	1,674,203	1,527,479	9.6

By brand	2003	2002	% chg
Verizon telecom	1,177,504	1,060,041	11.1

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$67,752	\$67,304	0.7
Earnings	3,077	4,079	-24.6
U.S.	2003	2002	% chg
Sales	65,303	64,756	0.8
Division sales	2003	2002	% chg
Domestic telecom	38,828	40,260	-3.6
Domestic wireless	22,436	19,424	15.5
Information services	4,114	4,287	-4.0
International	1,921	2,191	-12.3

Headquarters

Verizon Communications/1095 Ave. of the Americas, New York, N.Y. 10016/Phone: (212) 395-2121.

Personnel, brands, agencies

Corporate: Ivan Seidenberg, chmn & CEO; Robert Ingalls, pres-retail mkts; Jerri DeVard, sr VP-brand mgmt & mktg comms; Mary Ellen Payne, VP-cons mktg comms; Monte Beck, VP-bus mktg comms; Amy Rubenstein, VP-brand mgmt; Donald Klika, exec dir-brand identity, naming & corp adv.

McGarry Bowen, New York. Lyle Tick, acct dir. — Verizon telecommunications svcs.

Verizon Media at Zenith (a joint venture of Zenith Media and ID Media), New York. Wendy Marquardt, pres; Marilyn Lunenfeld, sr VP & dir-client svcs; Roy O'Reilly, sr VP & dir-broadcaster's svcs. — media buying.

Avenue A, New York. Patrick Houndsell, grp acct dir. — interactive media svcs.

AdAsia Communications, New York. Kevin Lee, pres; Annie Shih, acct dir. — asian-american adv & media buying.

Burrell Communications Group, Chicago. McGhee Williams, exec VP; Jacqueline High, sr VP & acct mgmt dir. — African-American adv.

Draft, New York. Nancy Grebey, exec VP. — direct mktg.

La Agencia de Orci & Asociados, Los Angeles. Dilys T. Garcia, chief operating officer; Leon Potasinki, sr VP & media dir. — Hispanic adv & media buying.

R/GA, New York. Dawn Winchester, VP-client svcs. — interactive mktg.

Verizon Information Services: Verizon Place, 2200 W. Airfield Dr., DFW Airport, Texas 75261-9810/Phone: (972) 453-7000. Katherine J. Harless, pres; Lester Chu, VP-mktg & strategic plng; Suzanne Franks, exec dir-mktg comms & branding.

Kirschenbaum Bond & Partners, New York. Rosemarie Ryan, pres. — Verizon SuperPages.

Verizon Media at Zenith, New York. Wendy Marquardt, pres. — media buying.

Verizon Wireless: 180 Washington Valley Rd., Bedminster, N.J. 07921/Phone: (908) 306-7000. Dennis F. Strigl, pres & CEO; Lowell McAdam, exec VP & chief operating officer; John Stratton, VP & chief mktg officer.

McCann Erickson Worldwide, New York. Thom Gruhler, grp mg dir. — Verizon Wireless telecommunications.

Verizon Media at Zenith, New York. Wendy Marquardt, exec VP & dir client svcs; Elizabeth Fox, sr VP & dir client svcs. — media buying.

GlobalHue, Southfield, Mich. Don Coleman, chmn & CEO. — multicultural adv.

Viva Partnership, Miami. Linda Gonzales, pres. — Hispanic media svcs.

21 Viacom

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$112,360	\$104,880	7.1
Sunday magazine	4,698	5,055	-7.1
Newspaper	132,506	93,035	42.4
National newspaper	35,381	29,846	18.5
Outdoor	19,440	24,232	-19.8
Network TV	138,562	134,875	2.7
Spot TV	74,003	106,302	-30.4
Syndicated TV	25,076	38,172	-34.3
Cable TV networks	127,061	135,159	-6.0
Network radio	16,369	16,486	-0.7
National spot radio	45,626	47,932	-4.8
Internet	20,105	18,388	9.3
Spanish-language TV	10,309	14,498	-28.9
Business publications	20,471	19,783	3.5
Local magazines	188	405	-53.6
Measured media	782,154	789,049	-0.9
Unmeasured media	466,607	470,720	-0.9
Total	1,248,761	1,259,769	-0.9
By brand	2003	2002	% chg
Paramount movies	447,569	375,976	19.0
CBS television network	67,936	69,353	-2.0
Blockbuster video stores	31,447	126,419	-75.1
Showtime cable television	23,742	32,197	-26.3
Nickelodeon cable television	18,436	16,076	14.7
Comedy Central cable TV	15,822	10,991	44.0
Indiana Jones videos	14,374	0	NA
MTV cable television	11,328	13,256	-14.5

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$26,585	\$24,606	8.0
Earnings	1,417	726	95.2
U.S.	2003	2002	% chg
Sales	21,698	20,577	5.4
Division sales	2003	2002	% chg
Television	7,761	7,457	4.1
Video	5,912	5,566	6.2
Cable networks	5,646	4,727	19.4
Entertainment	4,101	3,680	11.4
Radio	1,748	1,634	7.0

Headquarters

Viacom/1515 Broadway, New York, N.Y. 10036/Phone: (212) 258-6000.

Notes

Viacom in 2003 purchased the 50% of Comedy Central it didn't already own from co-owner Time Warner for \$1.26 billion. TNN, The National Network, has been renamed Spike TV to increase male viewership. By mid-year 2004, Viacom is expected to spin off Blockbuster, the video rental chain, in a tax-free split-off and take a \$1.3 billion charge to write down the value of the business. Cheap sales of DVDs by retailers and new video technologies like video on demand and personal video recorders have cut deeply into Blockbuster business.

Personnel, brands, agencies

Corporate: Sumner Redstone, chmn & CEO; Tom Freston, co-pres & co-chief operating officer; Leslie Moonves, co-pres & co-chief operating officer.

BET: 1 BET Plaza, 1235 W Place NE, Washington D.C., 20018/Phone: (202) 608-2000. Robert L. Johnson, founder & CEO; Debra Lee, pres & chief operating officer; Louis Carr, pres-media sales; Kelli Lawson, exec VP-mktg & comms; Brucetta Williams, VP-off-channel mktg; Matthew Barnhill, VP-mktg rsch & creative svcs; Michael Lewellen, VP-corp comms.

Agencies assigned on a project basis. — off-channel mktg.
In-house.

Blockbuster: 1201 Elm St., Dallas, Texas 75270/Phone: (214) 854-3000. John Antioco, chmn & CEO; Nigel Travis, pres & chief operating officer; Nick Shepherd, exec VP & chief mktg & merch officer; Scott Parks, VP-adv.

Doner, Southfield, Mich. Kevin Wineman, exec VP & acct mgmt dir.

J. Walter Thompson Co., Chicago. Erin Clark, grp mgmt dir.

Camelot Communications, Dallas. Tom Kalahar, CEO. — media buying.

Bravo Group, Miami. Mary Miqueli, sr VP & gm. — Hispanic adv.

CBS Television: 51 W. 52nd St., New York, N.Y. 10019/Phone: (212) 975-4321. Leslie Moonves, co-pres & co-chief operating officer-Viacom; Joann Ross, pres-sls; George Schweitzer, exec VP-mktg & comms.

In-house.

Carat North America, New York. John Adams, grp acct dir. — media svcs.

Infinity Broadcasting Corp.: 1515 Broadway, New York, N.Y. 10036/Phone: (212) 846-3939. John Sykes, chmn & CEO; Joel Hollander, pres & chief operating officer.

No agency.

MTV Networks: 1515 Broadway, New York, N.Y. 10036/Phone: (212) 258-8000. Tom Freston, chmn & CEO; Mark Rosenthal, pres & chief operating officer; Judith McGrath, pres-MTV, VH1, CMT, Comedy Central & MTV2; Herb Scannell, pres-MTV Networks Grp & Nickelodeon Networks; Sue Danaher, exec VP & genl sales mgr-Nickelodeon, Nick at Nite, TV Land & Spike TV; Dough Rohrer, exec VP- genl sales music & Comedy Central adv; Larry Divney, pres & CEO-Comedy Central; Van Toffler, pres, MTV & MTV2; Christina Norman, gm-VH-1; Bill Hilary, exec VP & gm-Comedy Central; Cathy Tankosic, sr VP-mktg, Comedy Central; Maureen Taxter, VP-cons prods mktg & retail; Dave Cohn, gm-MTV2 & MTVN; Brian Phillips, sr VP/gm-CMT.

In-house. — CMT, MTV, MTV2, Nickelodeon, Nick at Nite, VH-1.

Colby & Partners, Santa Monica, Calif. Dale Lanier, acct exec & exec producer. — print & broadcast adv, Spike TV.

MPG. Tom Stolfi, sr VP & grp acct dir. — media svcs, Comedy Central.

Paramount Home Entertainment: 5555 Melrose Ave., Los Angeles, Calif. 90038/Phone: (323) 956-5000. Meagan Burrows, pres-domestic home entertainment; Michael Arkin, sr VP-mktg.

MediaVest, Los Angeles. Christine Merrifield-Wehrle, sr VP & grp dir/New York; Tom Szczepanski, sr VP & mg dir MediaVest/Los Angeles; Claudia Ragsdale, grp dir. — media svcs.

Paramount Parks: 8720 Red Oak Blvd., ste. 315, Charlotte, N.C. 28217/Phone: (704) 561-8100. Brett Petit, sr VP-corp mktg; Rob Collins, VP-adv-corp mktg; Dale Kaetzel, VP-mktg, Paramount's Carowinds; Bob White, VP-mktg, Paramount's Great America; Ed Kuhlmann, VP-mktg, Paramount's King's Dominion; Linda Jensen, VP-mktg, Paramount's King's Island; Scott McConnell, VP-mktg, Paramount Canada's Wonderland.

Barkley Evergreen & Partners, Kansas City, Mo. Pucka Tomasic, sr VP & acct dir; Knox Duncan, sr VP & media.

Paramount Pictures: 5555 Melrose Ave., Los Angeles, Calif. 90038/Phone: (323) 956-5000. Jonathan Dolgen, chmn-Viacom entertainment grp; Sherry Lansing, chmn-motion picture grp; Rob Friedman, chief operating officer-Paramount Pictures & vice chmn-motion picture grp; Donald De Line, vice chmn-motion pictures grp & pres, Paramount Pictures; Tom Jacobson, co-pres-Paramount Pictures; Karen Rosenfelt, pres-Paramount prodn; Wayne Lewellen, pres-distribution; Gerry Rich, pres-ww mktg; Joanna Johnson, exec VP-ww publicity; Steve Siskind, exec VP-natl adv & promo; Nancy Kirkpatrick, exec VP-ww publicity; David Dinerstein, co-pres-Paramount Classics; Ruth Vitale, co-pres-Paramount Classics.

Starcom MediaVest, New York. Christine Merrifield, sr VP-grp dir. — media buying.

Paramount Television: 5555 Melrose Ave., Los Angeles, Calif. 90038/Phone: (323) 956-5000. John Wentworth, exec VP-mktg & media rel; Michael Mischler, exec VP-mktg, domestic TV.

In-house.

Showtime Networks: 1633 Broadway, New York, N.Y. 10019/Phone: (212) 708-1600. Matthew Blank, chmn & CEO; Len

Fogge, exec VP-creative & mktg; Geof Rochester, sr VP-mktg; Stephanie Gibbons, sr VP-adv & promo; George DeBolt, VP-media.

Red Group (in-house)

MKA, New York. Mary Beth Weil, principal & exec acct dir; Karin Henderson, principal & exec creative dir.

Starcom, Chicago. Ann Copsey, asst media dir. — media svcs.

Simon & Schuster: 1230 Ave. of the Americas, New York, N.Y. 10020/Phone: (212) 698-7000. Jack Romanos, pres & chief operating officer; Michael Selleck, sr VP & exec dir-mktg; Carolyn K. Reidy, pres-Adult Publishing Grp; Rick Richter, pres-Children's Publishing Div.

In-house.

UPN: 11800 Wilshire Blvd., Los Angeles, Calif. 90025/Phone: (310) 575-7000. Dawn Ostroff, pres; Rachel Clark, sr VP-mktg & media ops.

Carat Interactive, Los Angeles. Mylene Valbuena, acct exec.

71 Visa International

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$26,972	\$28,859	-6.5
Newspaper	2,754	3,398	-19.0
National newspaper	1,612	2,114	-23.7
Outdoor	1,250	3,829	-67.4
Network TV	184,511	184,953	-0.2
Spot TV	2,256	5,642	-60.0
Syndicated TV	15,309	9,028	69.6
Cable TV networks	46,204	33,915	36.2
Network radio	6,765	4,382	54.4
National spot radio	3,403	1,849	84.0
Internet	29,574	23,908	23.7
Spanish-language TV	9,666	42	NA
Business publications	2,517	2,884	-12.7
Local magazines	28	NA	NA
Measured media	332,821	304,803	9.2
Unmeasured media	129,242	118,362	9.2
Total	462,063	423,165	9.2
By brand	2003	2002	% chg
Visa credit cards	332,819	304,801	9.2

Headquarters

Visa International/P.O. Box 8999, San Francisco, Calif. 94128/Phone: (650) 432-3200.

Personnel, brands, agencies

Corporate: Christopher Rodrigues, pres & CEO; John Elkins, exec VP-global brand & mktg.

Visa USA: P.O. Box 194607, San Francisco, Calif. 94119/Phone: (415) 932-2100. Carl F. Pascarella, pres & CEO; Susanne Lyons, chief mktg officer; Elizabeth Silver, sr VP-adv; Nancy Friedman, VP-adv; Michael Lynch, sr VP-event & sponsorship mktg.

BBDO Worldwide, New York. Rich Kronengold, chief mktg officer.

OMD Worldwide, New York. Matt Kasindorf, plng & print buying; John Mattimore, natl bdcst buying. — media svcs.

55 Volkswagen

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$76,612	\$50,888	50.5
Sunday magazine	3,324	690	381.5
Newspaper	21,757	26,091	-16.6
National newspaper	21,002	11,521	82.3
Outdoor	4,129	1,145	260.7
Network TV	187,838	219,596	-14.5
Spot TV	73,848	81,304	-9.2
Syndicated TV	793	2	NA
Cable TV networks	25,919	33,981	-23.7
National spot radio	15,599	13,330	17.0
Internet	4,584	3,444	33.1
Spanish-language TV	12,293	1,780	590.5
Business publications	539	350	53.9
Local magazines	597	438	36.4
Measured media	448,833	444,561	1.0
Unmeasured media	159,333	157,817	1.0
Total	608,166	602,377	1.0
By brand	2003	2002	% chg
Volkswagen vehicles	367,228	369,912	-0.7
Audi vehicles	81,299	74,614	9.0

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$99,470	\$82,621	20.4
Earnings	1,250	2,455	-49.1
North America	2003	2002	% chg
Sales	16,701	16,417	1.7
Division sales	2003	2002	% chg
Automotive	87,592	73,646	18.9
Financial svcs	11,878	8,975	32.3

Headquarters

Volkswagen/D-38436, Wolfsburg, Germany /Phone: 49-5361-923596.
Volkswagen/Volkswagen of America, 3800 Hamlin Rd., Auburn Hills, Mich. 48326/Phone: (248) 754-5000.

Personnel, brands, agencies

Corporate: Bernd Pischetsrieder, chmn; Gerd Klaus, pres & CEO-Volkswagen of America.

Audi of America: 3800 Hamlin Rd., Auburn Hills, Mich. 48326/Phone: (248) 754-5000. Axel Mees, VP; Reinhard Fischer, genl sls mgr; Marc Trahan, dir-aftersales; Mary Ann Wilson, media buying mgr.

McKinney & Silver, Raleigh, N.C. Cameron McNaughton, exec VP & chief operating officer. — Audi vehicles.

MPG, New York. Steve Moynihan, exec VP & mg dir. — media svcs.

Bentley Motors: 3800 Hamlin Rd., Auburn Hills, Mich. 48326/Phone: (248) 754-6464. Alasdair Stewart, pres & CEO-N. Amer.; David Goggins, natl mktg dir.

Furneaux Stewart, Birmingham, Mich. Julie Barnard, dir.

Volkswagen of America: 3800 Hamlin Rd., Auburn Hills, Mich. 48326/Phone: (248) 754-5000. Len Hunt, VP; Zafar Brooks, genl mktg mgr.

Arnold Worldwide, Boston. Ron Lawner, chmn & chief creative officer; Fran Kelly, pres & chief operating officer; John Castle, mg ptr. — Volkswagen vehicles.

MPG, New York. Steve Moynihan, exec VP & mg dir. — media svcs.

CreativeOnDemand, Coral Gables, Fla. Daniel Marrero, ptrn; Priscilla Cortizas, ptrn. — Hispanic adv.

49 Wal-Mart Stores

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$13,964	\$15,712	-11.1
Sunday magazine	10,800	6,091	77.3
Newspaper	13,948	20,076	-30.5
National newspaper	116	71	63.1
Outdoor	411	606	-32.1
Network TV	179,524	150,666	19.2
Spot TV	106,189	110,690	-4.1
Syndicated TV	38,892	29,193	33.2
Cable TV networks	68,958	68,563	0.6
Network radio	2,993	1,960	52.7
National spot radio	1,325	1,344	-1.4
Internet	10,782	4,137	160.6
Yellow Pages	2,551	3,634	-29.8
Spanish-language TV	28,158	23,574	19.4
Business publications	836	852	-1.8
Measured media	479,447	437,167	9.7
Unmeasured media	198,413	180,916	9.7
Total	677,860	618,083	9.7
By brand	2003	2002	% chg
Wal-Mart discount stores	467,708	420,762	11.2

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$256,329	\$229,616	11.6
Earnings	9,054	7,955	13.8
U.S.	2003	2002	% chg
Sales	208,757	188,822	10.6
Operating income	14,042	12,863	9.2
Division sales	2003	2002	% chg
Wal-Mart	174,220	157,121	10.9
International	47,572	40,794	16.6
Sam's Club	34,537	31,702	8.9
Other (McLane)	0	14,907	NA

Headquarters

Wal-Mart Stores/702 SW Eighth St., Bentonville, Ark. 72716/Phone: (479) 273-4000.

Notes

Wal-Mart completed the sale of food-distribution company McLane Cos. for \$1.5 billion to Berkshire Hathaway in May 2003.

Personnel, brands, agencies

Corporate: S. Robson Walton, chmn; Lee Scott, pres & CEO.

Sam's Club: 608 S.W. Eighth St., Bentonville, Ark. 72716/Phone: (479) 273-4000. Kevin Turner, pres & CEO; Doug McMillon, exec VP, merch; Celia Swanson, exec VP, membership mktg & admin.
GSD&M, Austin, Texas. Klaudia Flanigin, VP & acct dir.

Wal-Mart Stores: 702 S.W. Eighth St., Bentonville, Ark. 72716/Phone: (479) 273-4000. Mike Duke, pres & CEO; Robert Connelly, exec VP-mktg; Mike Cockrell, VP-mktg; Randy Curtis, VP-creative; Randy Hughes, dir-media.

GSD&M, Austin, Texas. Alicia Smith Kriese, sr VP, grp dir.
Bernstein-Rein Advertising, Kansas City, Mo. Skip Rein, vice chmn; Rusty Scholtes, sr VP. — corp adv & media.

E. Morris Communications, Chicago. Eugene Morris, chmn & CEO; Jackie McCauley, sr VP, dir-client svcs. — African-American adv.

Lopez Negrete Communications, Houston. Alex Lopez Negrete, pres; Adalis Arroyo, grp acct dir. — Hispanic adv.

88 Wendy's International

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$32,941	\$34,680	-5.0
Sunday magazine	0	759	NA
Newspaper	33	67	-51.5
National newspaper	181	340	-46.9
Outdoor	7,013	6,592	6.4
Network TV	150,599	134,003	12.4
Spot TV	44,592	46,802	-4.7
Syndicated TV	32,717	26,885	21.7
Cable TV networks	34,597	29,393	17.7
Network radio	120	50	140.0
National spot radio	3,399	2,850	19.3
Internet	996	52	NA
Spanish-language TV	14,263	17,036	-16.3
Business publications	26	19	35.8
Measured media	321,474	299,527	7.3
Unmeasured media	64,334	59,942	7.3
Total	385,808	359,469	7.3
By brand	2003	2002	% chg
Wendy's restaurants	315,301	290,171	8.7

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$3,149	\$2,730	15.3
Earnings	236	219	7.8
U.S.	2003	2002	% chg
Sales	2,197	1,981	10.9
Division sales	2003	2002	% chg
Wendy's	2,191	2,010	9.0
Tim Horton	807	651	24.0
Baja Fresh	151	69	118.8

Headquarters

Wendy's International/One Dave Thomas Blvd., P.O. Box 256, Dublin, Ohio 43017-0256/Phone: (614) 764-3100.

Personnel, brands, agencies

Corporate: Jack Schuessler, chmn & CEO; Denny Lynch, sr VP-comms.

McCann Erickson Worldwide, New York. Gary Steele, exec VP.

Universal McCann Worldwide, New York. George Hayes, exec VP & client svcs dir. — media svcs.

Fresh Enterprises: 100 Moody Ct., Ste. 200, Thousand Oaks, Calif. 91360/Phone: (805) 495-4704. Bill Moreton, pres & CEO.

No agency.

TDL Group: 874 Sinclair Rd., Oakville, Ontario L6K 2Y1 Canada/Phone: (905) 845-6511. Paul D. House, pres & chief operating officer; Bill Moir, exec VP-mktg; Chris Laganos, sr VP-U.S.

Enterprise Creative Selling, Toronto, Ont. Alison Simpson, pres. — Tim Hortons.

Wendy's North America: One Dave Thomas Blvd., Dublin, Ohio 43017-0256/Phone: (614) 764-3100. Thomas J. Mueller, pres & chief operating officer; Donald F. Calhoun, exec VP-mktg; Robert Levite, sr VP-mktg; Mary Ann Pilotte, sr VP-mktg; Michelle Fedurek, VP-media svcs; Jeff Whitney, VP-field mktg.

McCann Erickson Worldwide, New York. Gary Steele, exec VP.

Universal McCann Worldwide, New York. Donna Wolfe, exec VP & chief negotiation officer. — media svcs.

Vidal Partnership, New York. Manny Vidal, founder; Tony Ruiz, ptnr. — Hispanic adv & media svcs.

40 Wyeth

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$40,289	\$36,245	11.2
Sunday magazine	11,552	10,039	15.1
Newspaper	12,229	893	NA
National newspaper	376	1,093	-65.6
Outdoor	256	440	-41.8
Network TV	127,426	125,606	1.4
Spot TV	5,065	4,393	15.3
Syndicated TV	41,728	44,588	-6.4
Cable TV networks	58,152	50,803	14.5
Network radio	19,216	5,260	265.3
National spot radio	2,875	1,669	72.3
Internet	8,802	6,466	36.1
Spanish-language TV	13,725	13,495	1.7
Business publications	1,223	1,536	-20.4
Measured media	342,914	302,525	13.4
Unmeasured media	478,496	422,138	13.4
Total	821,410	724,663	13.4
By brand	2003	2002	% chg
Advil pain remedies	95,582	96,606	-1.1
Alavert allergy remedies	55,493	0	NA
Effexor anti-depression Rx	47,499	2,800	1596.2
Centrum vitamins	37,827	43,969	-14.0
Robitussin cough remedies	17,286	18,154	-4.8
Dimetapp cold remedies	17,053	15,442	10.4
Synvisc arthritis Rx	15,439	18,819	-18.0
Caltrate calcium tablets	14,867	13,320	11.6
Chapstick lip balm	10,572	12,921	-18.2

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$15,851	\$14,584	8.7
Earnings	2,051	4,447	-53.9
U.S.	2003	2002	% chg
Sales	9,581	9,234	3.8
Division sales	2003	2002	% chg
Pharmaceuticals	12,623	11,733	7.6
Consumer Health Care	2,435	2,197	10.8
Animal Health Care	793	653	21.5

Headquarters

Wyeth/5 Giralda Farms, Madison, N.J. 07940/Phone: (973) 660-5000.

Personnel, brands, agencies

Corporate: Robert Essner, chmn, pres & CEO.

Wyeth Advertising (In-house) Richard Feldheim, pres; Marianne McArdle, exec VP-TV.

Fort Dodge Animal Health: 9225 Indian Creek Pkwy. Ste. 400, Overland Park, Kan. 66210/Phone: (913) 664-7000. E. Thomas Corcoran, pres; Brent Standridge, sr VP-sls & mktg; Scott Bormann, VP-equine & livestock prods.

Latorra, Paul & McCann, Syracuse, N.Y. Lou Latorra, pres.

Wyeth Consumer Healthcare: 5 Giralda Farms, Madison, N.J. 07940/Phone: (973) 660-5000. Ulf Wiinberg, pres-Wyeth Consumer Healthcare; Doug Rogers, pres-U.S. Consumer Healthcare; Valerie Caruso, sr VP-GI/topical bus unit; Suneet Varma, sr VP-respiratory bus unit; Andy Davis, sr VP-nutritional bus unit; Bob Sanders, sr VP-analgesics bus unit; Roger Gravitte, sr VP-sls; Keith Wypyszynski, sr VP-trade relations; Mark Sobray, VP-medical sls & mktg; Steve Palmisano, sr VP-adv dir.

Carrafiello-Diehl Associates, Irvington, N.Y. Nancy Silverman, mgmt super. — Caltrate, Centrum, Centrum Carb Assist, Centrum Performance, Centrum Silver, FiberCon.

Grey Worldwide, New York. John Edwards, exec VP, mg ptrn; Bob Burruss, exec VP, mg ptrn. — Advil, Advil Cold & Sinus, Children's Advil, Alavert, Chap Stick, Preparation-H, Robitussin.

McCann Erickson Worldwide, New York. Greg Fujimoto, sr VP, mgmt dir. — Anbesol, Dimetapp.

No agency. — Axid AR, Orudis KT, Primatene.

Wyeth Pharmaceuticals: 500 Arcola Rd., Collegeville, Pa. 19426/Phone: (610)902-1200. Bernard J. Poussot, pres.

Dorland Global Health Communications, Philadelphia. Harry Sweeney, chmn & CEO; Rita Sweeney, pres & chief operating officer; Richard Minoff, pres-Dorland Pharmaceutical. — institutional care, managed care, pharmaceutical care.

Euro RSCG Life Chelsea, New York. Ed Stapor, pres; Pamela Pinta, exec VP, dir-client svcs; Steve Nothel, grp VP; Michael McNamara, VP, acct super; Nancy Morris, VP, mgmt super; Bob Louer, grp VP. — Effexor Xr, Protonix, Synvisc, Zosyn IV.

Euro RSCG Life LM&P, New York. Carmine Laliberte, pres; Roxanne Mendoza, VP acct super; Pam Rogers, VP mgmt super. — FluMist, Meningitec, Prev(e)nar.

Grey Healthcare Group, New York. Lyn O' Conner Vas, CEO; Diane Teeling, chief financial officer. — prof, Benefix, Librel, Premarin, Prempro, ReFacto.

Mueller Wister, Plymouth Meeting, Pa. Kurt Mueller, exec VP; Eric Mueller, VP. — Rapamune.

Saatchi & Saatchi Healthcare, New York. David Marek, exec VP, dir-ops. — Enbrel.

In-house. Richard Feldheim, pres. — media buying.

Healthworld Communications Group, New York. Stephen Wray, pres & CEO. — cons awareness adv, Bazedoxifene, Premarin DTC, Premarin VC, Synvisc DTC, Tigecycline.

46 Yum Brands

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
Magazine	\$617	\$456	35.1
Newspaper	768	584	31.4
National newspaper	73	413	-82.3
Outdoor	5,701	5,846	-2.5
Network TV	322,368	293,126	10.0
Spot TV	197,293	226,066	-12.7
Syndicated TV	2,081	96	NA
Cable TV networks	99,923	84,111	18.8
Network radio	499	381	31.0

U.S. ad spending (\$ in thousands)

By media	2003	2002	% chg
National spot radio	8,321	5,494	51.5
Internet	457	3,137	-85.4
Yellow Pages	7,070	6,327	11.7
Spanish-language TV	14,714	8,815	66.9
Business publications	16	304	-94.8
Local magazines	NA	16	NA
Measured media	659,900	635,172	3.9
Unmeasured media	101,249	97,455	3.9
Total	761,149	732,627	3.9
By brand	2003	2002	% chg
KFC restaurants	232,230	232,605	-0.2
Taco Bell restaurants	205,315	200,948	2.2
Pizza Hut restaurants	188,236	165,861	13.5
Long John Silver's restaurants ..	25,946	28,481	-8.9

Sales & earnings (\$ in millions)

Worldwide	2003	2002	% chg
Sales	\$8,380	\$7,757	8.0
Earnings .....	.617	583	5.8
U.S.	2003	2002	% chg
Sales	5,655	5,347	5.8
Operating profit .....	.812	802	2.2
Division sales	2003	2002	% chg
Company sales	7,441	6,891	8.0
Franchise/license fees .....	.939	866	8.4

Headquarters

Yum Brands/1441 Gardiner Lane, Louisville, Ky. 40213/Phone: (502) 874-8300.

Personnel, brands, agencies

Corporate: David Novak, chmn & CEO.

Mediaedge:cia Worldwide, New York. Charles Courtier, exec chmn ww; Lee Doyle, mg ptrn, client svcs dir; Tim Jones, mg ptrn, acct dir. — media svcs.

A&W All American Food: 1441 Gardiner Lane, Louisville, Ky. 40213/Phone: (502) 874-8300. Mike Tattersfield, pres; Ken Thewes, dir-mktg; Bill Ruby, mktg mgr; Natalie Grider, adv mgr.

Creative Alliance, Louisville, Ky. Luke Blackburn, VP-acct svcs; Dani Reich, acct exec.

KFC Corp.: 1441 Gardiner Lane, Louisville, Ky. 40213/Phone: (502) 874-8300. Gregg Dedrick, pres & chief concept officer; Scott Bergren, chief mktg officer, mktg & food innovation; James O'Reilly, VP-brand & sls building; Peter Foulds, VP-adv; Mindy Welsh, dir-media & promos.

Footie, Cone & Belding Worldwide, Chicago. Tom O'Keefe, exec creative dir.

Mediaedge:cia Worldwide, New York. Charels Courtier, exec chmn ww; Lee Doyle, mg ptrn, client svcs dir; Tim Jones, mg ptrn, acct dir. — media svcs.

Creative Alliance, Louisville, Ky. Chris Fuller, VP-acct svcs; Marilyn Nichol森, sr VP-acct svcs. — print & point-purchase.

Long John Silver's: 1441 Gardiner Lane, Louisville, Ky. 40213/Phone: (502) 874-8300. Steve Davis, pres & CEO; Mike Baker, chief mktg officer; Pam King, dir-brand mktg; Paula Ashley-Rogness, dir-media; Gene Stefaniak, sr mgr-cons insights; Michelle Moore, adv analyst.

BBDO Worldwide, New York. Andy Russem, sr acct dir; Kelly Herron, acct exec.

Euro RSCG Worldwide, Dallas. Ray Rosenbaum, chief operating officer; Judy Brooks, sr VP; Christina Clarke, acct dir; Amanda Wells, acct mgr.

Mediaedge:cia Worldwide, New York. Charles Courtier, exec chmn ww; Lee Doyle, mg ptnr, client svcs dir; Tim Jones, mg ptnr, acct dir. — media svcs.

Empower MediaMarketing, Cincinnati. Maria Topken, sr VP; Cathy Shaffner, acct super. — natl media buying.

Creative Alliance, Louisville, Ky. Luke Blackburn, VP-acct svcs; Kate Hall, acct super. — natl print creative, natl print & point-of-purchase & merch creative.

Pizza Hut: 14841 Dallas Pkwy., Dallas, Texas 75254/Phone: (972) 338-7700. Peter Hearl, pres & chief concept officer; Tom James, chief mktg officer; Larry Dykstra, VP-cons insights & strategy; Sean Gleason, VP-mktg comms; Cindy Davis, VP-natl mktg.

BBDO Worldwide, New York. Rick Doerr, VP & acct dir.

Euro RSCG Worldwide, Dallas. Pat Furey, pres; Ray Rosenbaum, chief operating officer; Judy Brooks, sr VP, client svcs.

Tracy Locke Partnership, Dallas. Ed Winter, CEO; Scott Hudgins, ptnr; Todd Nonken, grp acct dir.

Mediaedge:cia Worldwide, New York. Charles Courtier, exec chmn ww; Lee Doyle, mg ptnr, client svcs dir; Tim Jones, mg ptnr, acct dir. — media svcs.

Taco Bell: 17901 Von Karman, Irvine, Calif. 92614/Phone: (949) 863-4500. Emil Brolick, pres & chief concept officer; Greg Creed, chief mktg officer; Debbie Myers, VP-media svcs & entertainment.

Foote, Cone & Belding Worldwide, San Francisco. Bob Gale, exec VP-acct dir; Tom O'Keefe, exec creative dir.

Mediaedge:cia Worldwide, New York. Charles Courtier, exec chmn ww; Lee Doyle, mg ptnr, client svcs dir; Tim Jones, mg ptnr, acct dir. — media svcs.

Initiative Media Worldwide, New York. Larry Orell, exec VP & gm. — local bdcst buying.